Washington Suburban Sanitary Commission

2013

ProjectDox Training Manual- Infrastructure Systems Group

Department of Information Technology

WSSC

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ISG ProjectDox Training Manual-Infrastructure Systems Group

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1. About this Guide

This document contains step-by-step information for the Avolve Standard Workflow Process. It is intended to provide detailed information for training purposes.

2. Audience

This guide is intended for use by Infrastructure Systems Group (ISG) users and departments involved in the electronic review process. The focus will be on the ProjectDox workflows for use in reviewing water and sewer reconstruction and relocation capital improvement projects.

3. Introduction

This document contains general concepts and workflow details for Avolve Standard Workflow Process using specific electronic forms (eForms). The workflow itself controls all the process steps including the invitation of the Applicant and all required plan review team members. It also controls the access and permission rights for all parties involved in the process. This is a proven business process currently in production at over 45 jurisdictions across the U.S.

The goal of the workflow process is to allow the Reviewers to spend as much of their time as possible within ProjectDox performing their plan review tasks. The developed workflow will manage the plan review documents, address task assignments, update review status changes, consolidate department reviews, issue and manage resubmit notifications and stamp final approved documents.

This document details each step name, identifies departments/users involved in the step, and provides step-by-step instructions for completing the process.

4. Key Concepts

Task

The definition of a task is an assignment to perform an action in the workflow.

Task List

A list items assigned to a user for a workflow process. If a user has no tasks assigned to them in the ProjectDox application, no Task List portal will display on the user's Active Projects page. If a user has been assigned a task for a given workflow process, the list will display in two areas of the ProjectDox site: the global task list, and the project specific task list.

Global Task List

A list displayed on the Active Projects page below the list of projects the user has been invited to. The list will show all tasks assigned to a user across all projects. A task can be selected by clicking the link under the Task heading of the portal or by selecting the Task List (PD Flow) button on the Active Projects page to display the task list as a separate window.

Project Specific Task List

If a focused view of a task for a specific project is needed, it is accessed by entering into a project and selecting the Task List (ProjectDox) button. Selecting this button while in the project will display a workflow page with any WF reports the user has access to, the project specific task assigned, and (if permission has been granted) the start workflow.

EForm

An eForm is an html page used by the workflow to share information and advance the workflow. A user only has access to the eForm when a task has been assigned to them or they have taken responsibility to perform a review for a given assignment.

First in Group

The first user who accepts a task takes responsibility for the assignment and the completion of the step. As an example, the Fire Department may consist of 5 persons. Using the concept of first-in-group the entire department will be notified of the review and a task issued to their task list. If user 1 of Fire Department accepts the task, it will be assigned specifically to User 1, and the other 4 users of the group will have the task removed from their task lists. *It is important to note that the Infrastructure Systems Group Units encourage the identification of reviewer resources prior to the start of the review process. This will help to enable notifications to be sent to the desired reviewers.*

Packaged Review

Electronic Plan Review uses the concept of packaged corrections where a single resubmit notice is sent to the Applicant after all review departments have completed their portions of the review process ("QA Review" and "Review Complete" steps must be completed before notice is sent to Applicant). The notice lists all departmental problems and issues to be resolved. The notice also contains links to the drawings and documents in question, with respective markups and notes.

Reminders

Reminders are not configurable as it must be hardcoded into workflow.

This is a list of the reminders that have been set up in the ISG workflow:

Applicant Upload

- Applicant will complete Applicant Upload task upon complete upload of all drawings and documents
    - If Applicant has not completed task in 45 days, a reminder will be sent

Prescreen Corrections

- If applicant does not resubmit within the requested period, the following will occur:
    - Notification reminder to Applicant at 10 days

Department Review

- If Department Review is not completed within 3 weeks (21 calendar days), notification sent to Review Coordinator group for action

There are no reminders sent on formal review corrections.

Standard Workflow Electronic Form Design

The eForm design contains four tabs at the top of the form that display information to the end-users regarding the workflow process or application. The four tabs are described below:

WSSC
ePlan Review
Review Information
Required Project Info
Routing Slip
Resources
Review Coordinator
WSSC ISG (support@avolvesoftware.com)
Review Cycle
1
Workflow/Activity Name
ISG Plan Review Workflow / ApplicantUpload
Activity Instructions
Please upload all necessary drawings and supporting documents to the corresponding folders. When all files have been uploaded and the submission is ready for WSSC review, please click the 'Upload Process Complete' button at the bottom of this form
Current User Logon
Kenn Bengtsson (kbengts@wsscwater.com)

Review Information

Displays information related to the current review in ProjectDox.

Required Project Info

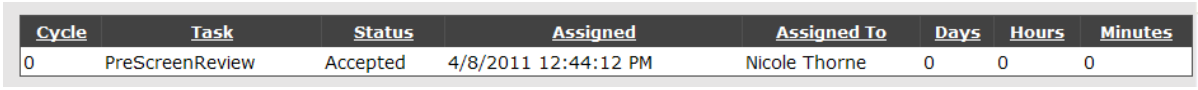
Displays information on Project data

Resources

Displays supporting resources like WSSC form on web or other sources of documentation.

Routing Slip

Displays the sequential steps of the workflow allowing a user to see when a step has been completed, in what cycle and by whom.



Cycle	Task	Status	Assigned	Assigned To	Days	Hours	Minutes
0	PreScreenReview	Accepted	4/8/2011 12:44:12 PM	Nicole Thorne	0	0	0

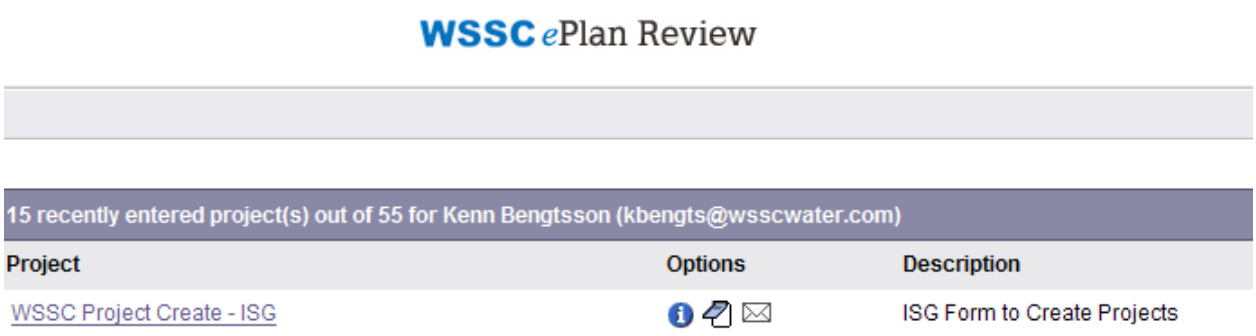
5. Create project

Participants: Review Coordinator (Project Managers)

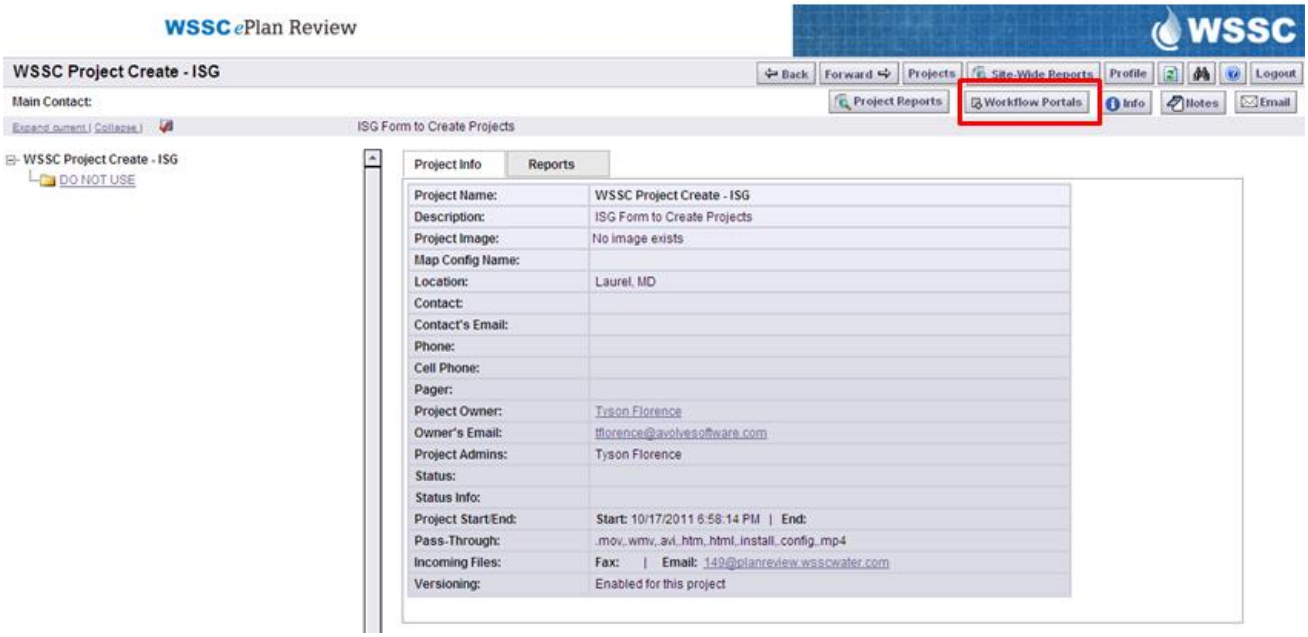
The ability to start a workflow is granted to designated project groups through the project template on the project groups tab by checking the “Allow Workflow Start” check box. The project template is established by the SA (System Administrator). The individual projects can be updated once a project is created by either an SA or a PA (Project Administrator). When selected this feature adds a section to the project specific task list that displays the available workflows that can be started.

In the Standard Electronic Review Process, the Review Coordinator Group is responsible for starting the workflow process. When projects are created, the applicant receives an email notification inviting the user to the site and project and providing instructions on how to upload documents to the site. Once the applicant uploads plans/documents to the site an email notification [ProjectDox New File Notification] is sent to each user in the Review Coordinator Group. These emails are the indication that a WF (Workflow) may be started for a review.

1. To create a project with ISG templates and workflow, click on the WSSC Project Create – ISG link from the *Project* column on the projects page (Upper left side on Project list)

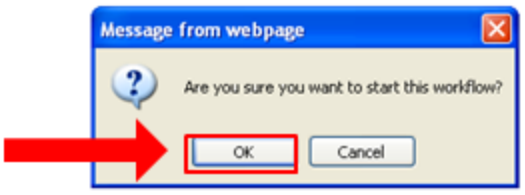


2. Click on Workflow Portals (In red rectangular below)

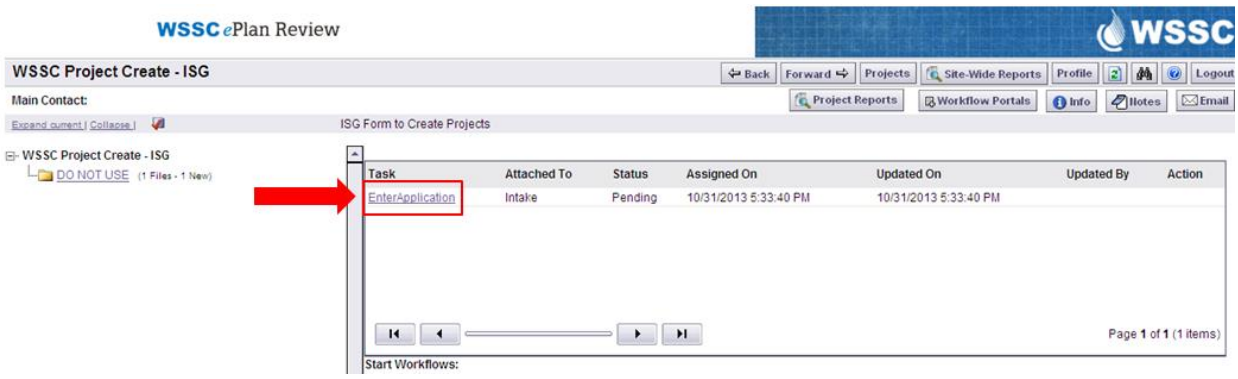


3. Now you can start the workflow by clicking on ISG Project Application link.

4. Accept by clicking on OK.

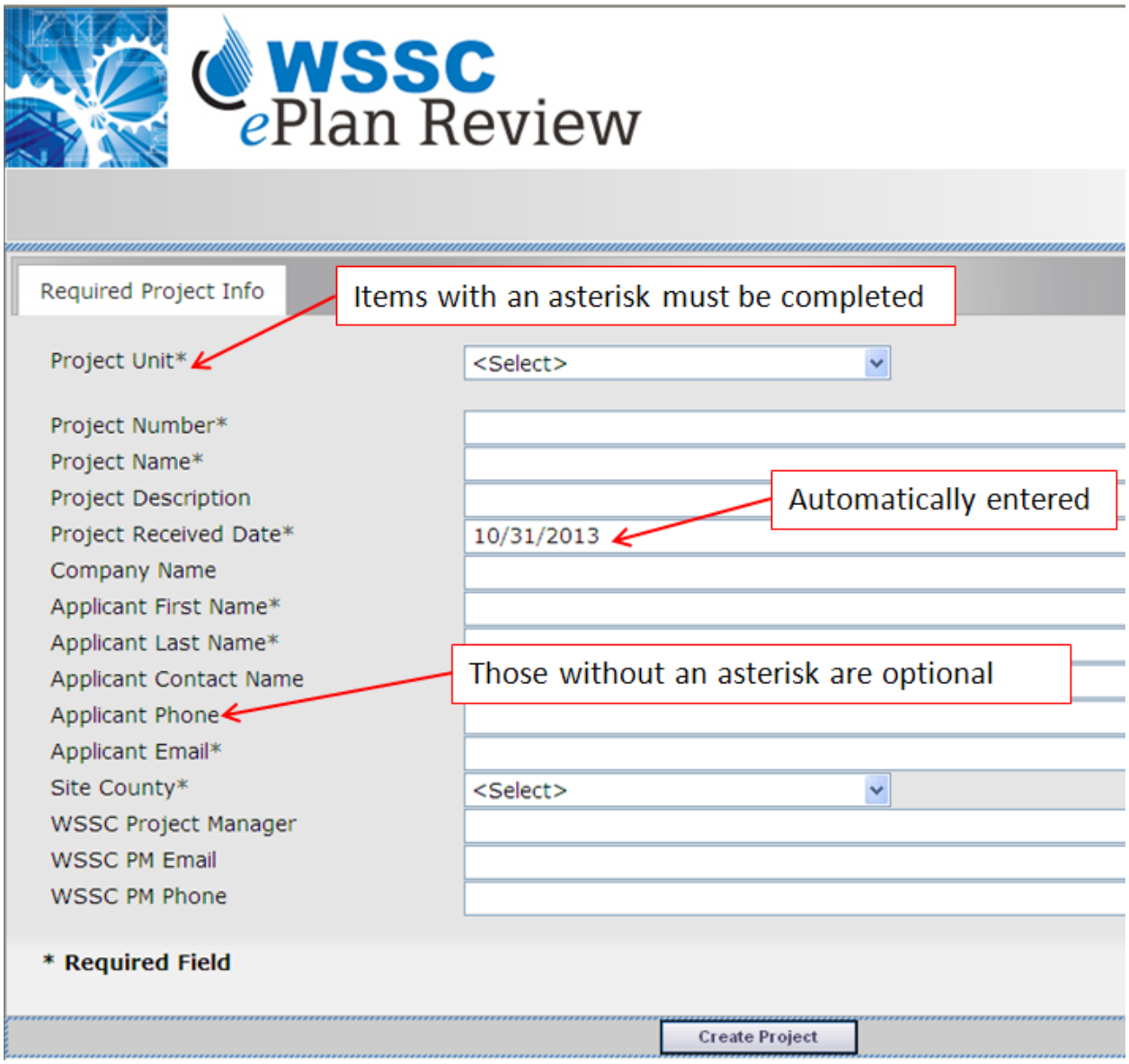


5. Enter the application by clicking on the task in red rectangular below



6. Accept the task by clicking OK

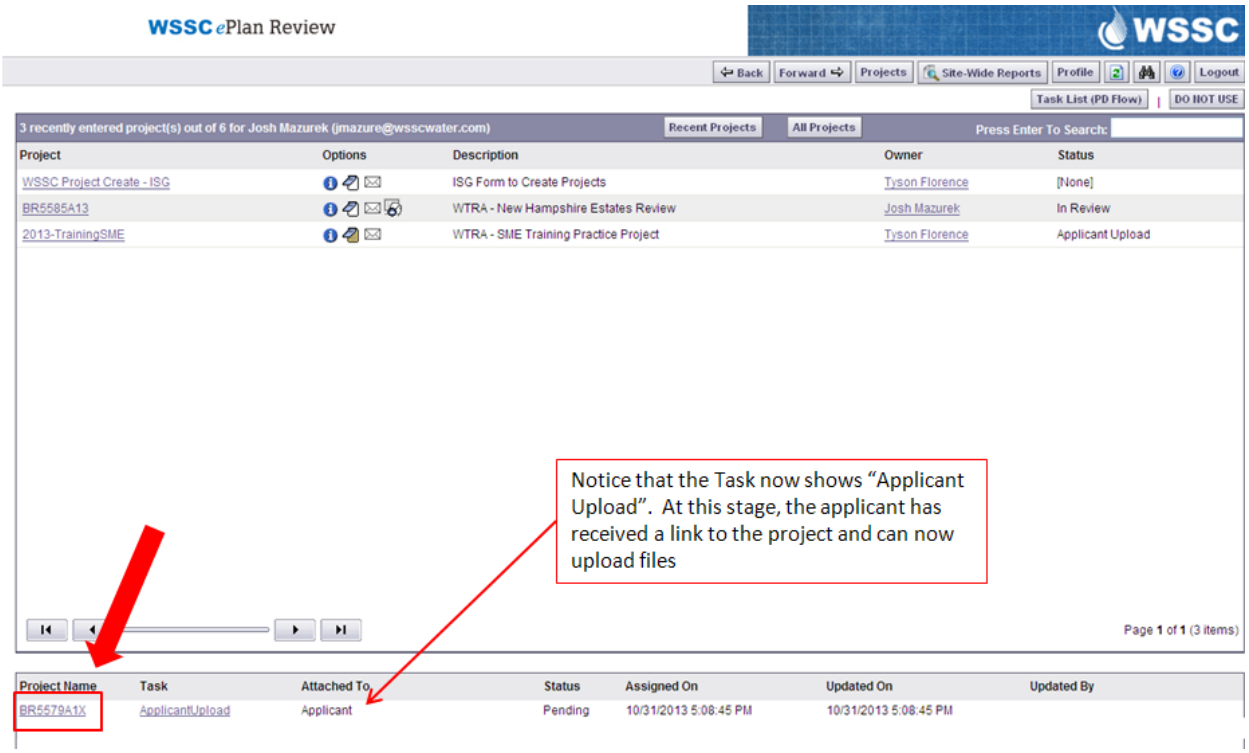
7. Enter the project information. All project information and options can be modified later through the Edit Project screen (with the exception of the Versioning Enabled setting).



Click on “Create Project” button.

Don’t forget to confirm the correct applicant email address as this will be used to notify the applicant that the project has been created and is ready for uploading documents.

8. Click on the “Project” button to verify the project is in the project list and is attached to “Applicant”

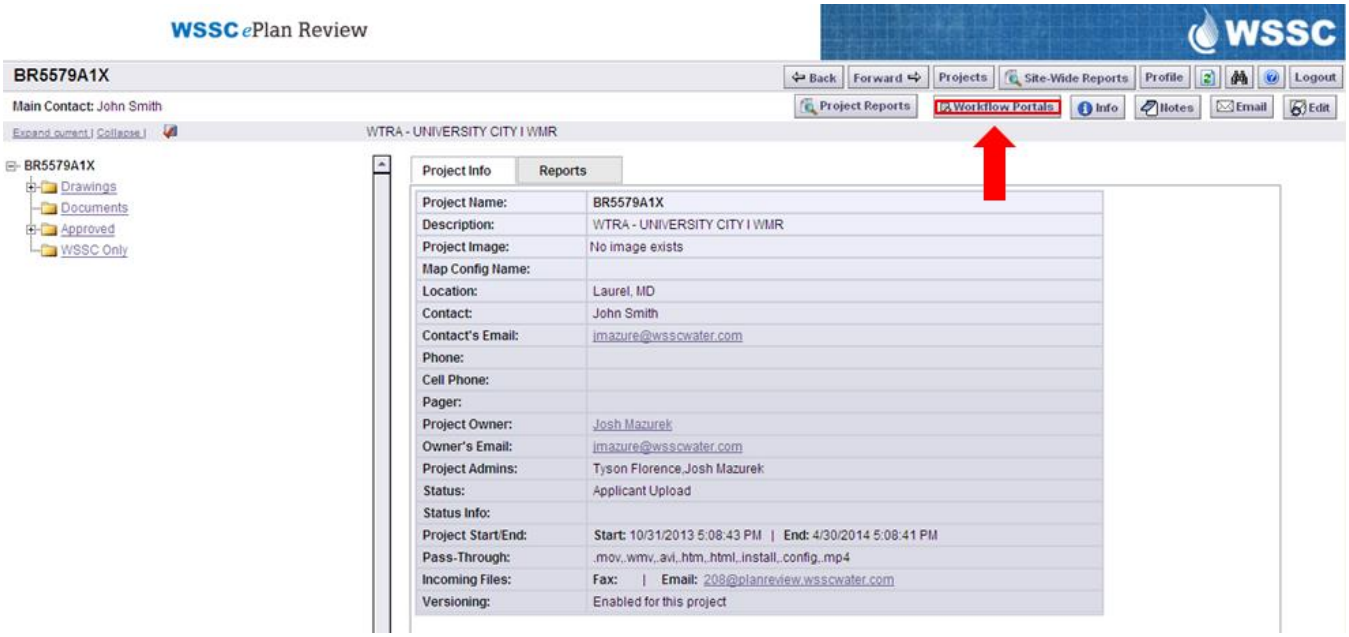


6. Applicant Upload

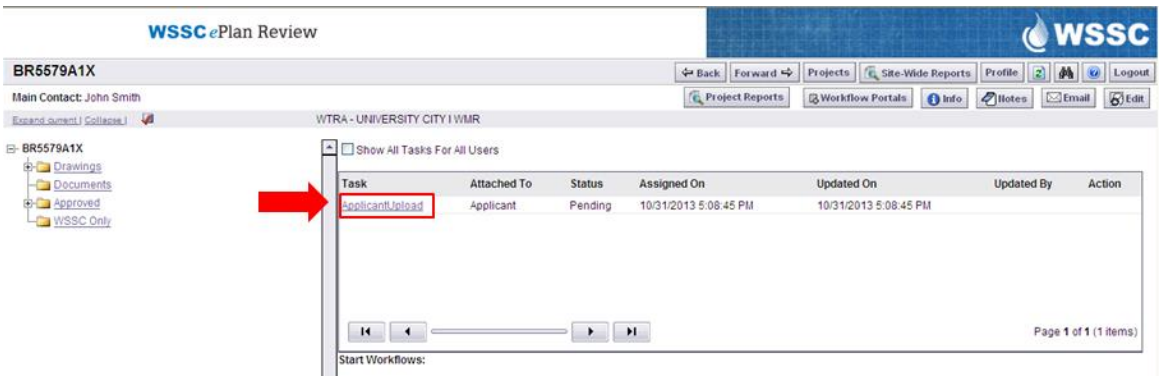
Applicants will receive an email invitation as a response to a Project Submittal Request.

After logging in to ProjectDox, the applicant will find the project in his task list.

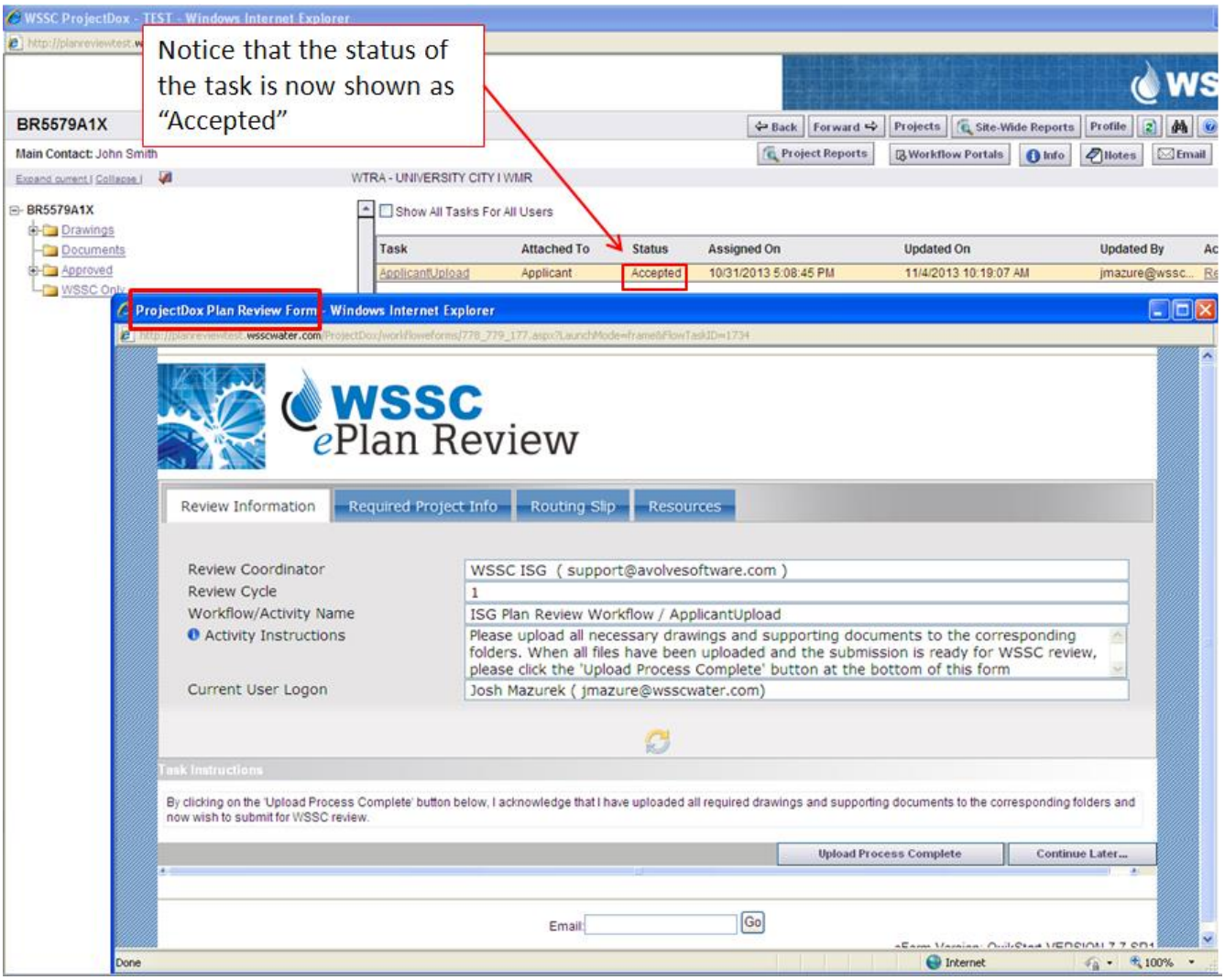
1. Click on the Project Name and then on Workflow Portal (You can click directly on the “Task” link to jump directly to the eForm as well).



2. Click on “Applicant Upload” and accept the task.



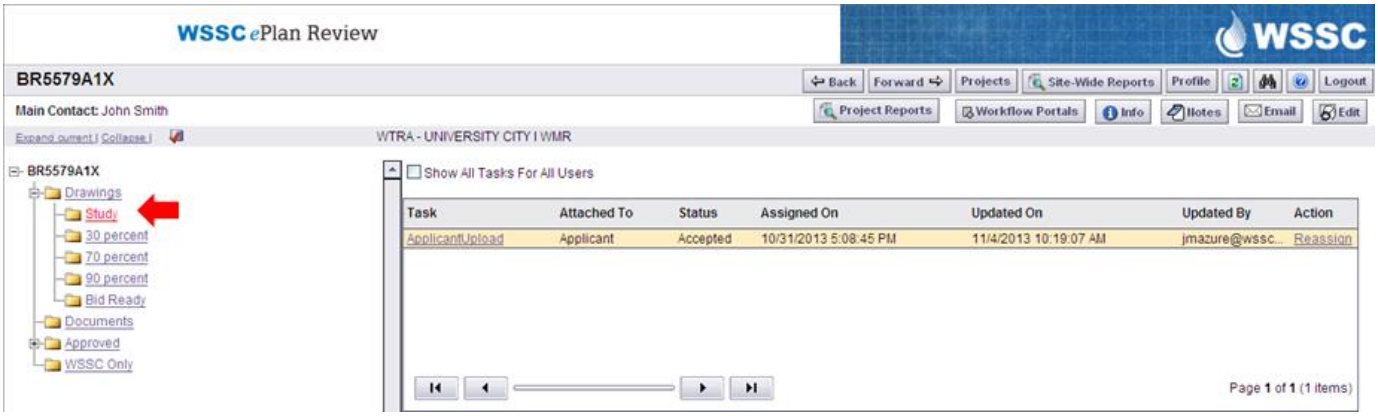
3. Once accepted by the applicant, a new window ProjectDox Plan Review Form will open. This Window is required to complete the File Upload Process. This window may be minimized, but Do Not Close/Exit.


Notice that the status of the task is now shown as "Accepted"
WSSC ProjectDox - TEST - Windows Internet Explorer
BR5579A1X
Main Contact: John Smith
Task
Attached To
Status
Assigned On
Updated On
Updated By
ApplicantUpload
Applicant
Accepted
10/31/2013 5:08:45 PM
11/4/2013 10:19:07 AM
ProjectDox Plan Review Form - Windows Internet Explorer
WSSC ePlan Review
Review Information
Required Project Info
Routing Slip
Resources
Review Coordinator
WSSC ISG (support@avolvesoftware.com)
Review Cycle
1
Workflow/Activity Name
ISG Plan Review Workflow / ApplicantUpload
Activity Instructions
Please upload all necessary drawings and supporting documents to the corresponding folders. When all files have been uploaded and the submission is ready for WSSC review, please click the 'Upload Process Complete' button at the bottom of this form
Current User Logon
Josh Mazurek (jmazure@wsscwater.com)
Task Instructions
By clicking on the 'Upload Process Complete' button below, I acknowledge that I have uploaded all required drawings and supporting documents to the corresponding folders and now wish to submit for WSSC review.
Upload Process Complete
Continue Later...
Email
Go
Done
Internet
100%

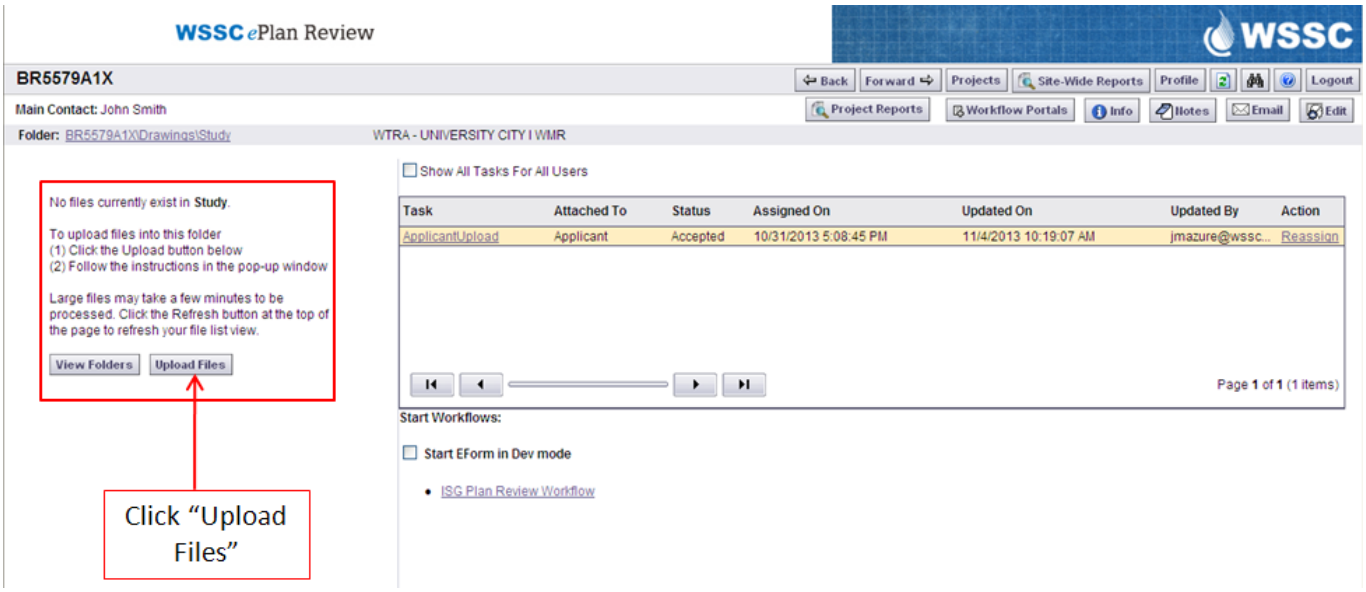
Follow the activity instructions to upload necessary documents and drawings.

- All plans must be in vector based format
- Plan sheets must be uploaded individually and not combined
- Must be uploaded to the correct folder
    - Study
    - 30 %
    - 70 %
    - 90 %
    - Bid ready

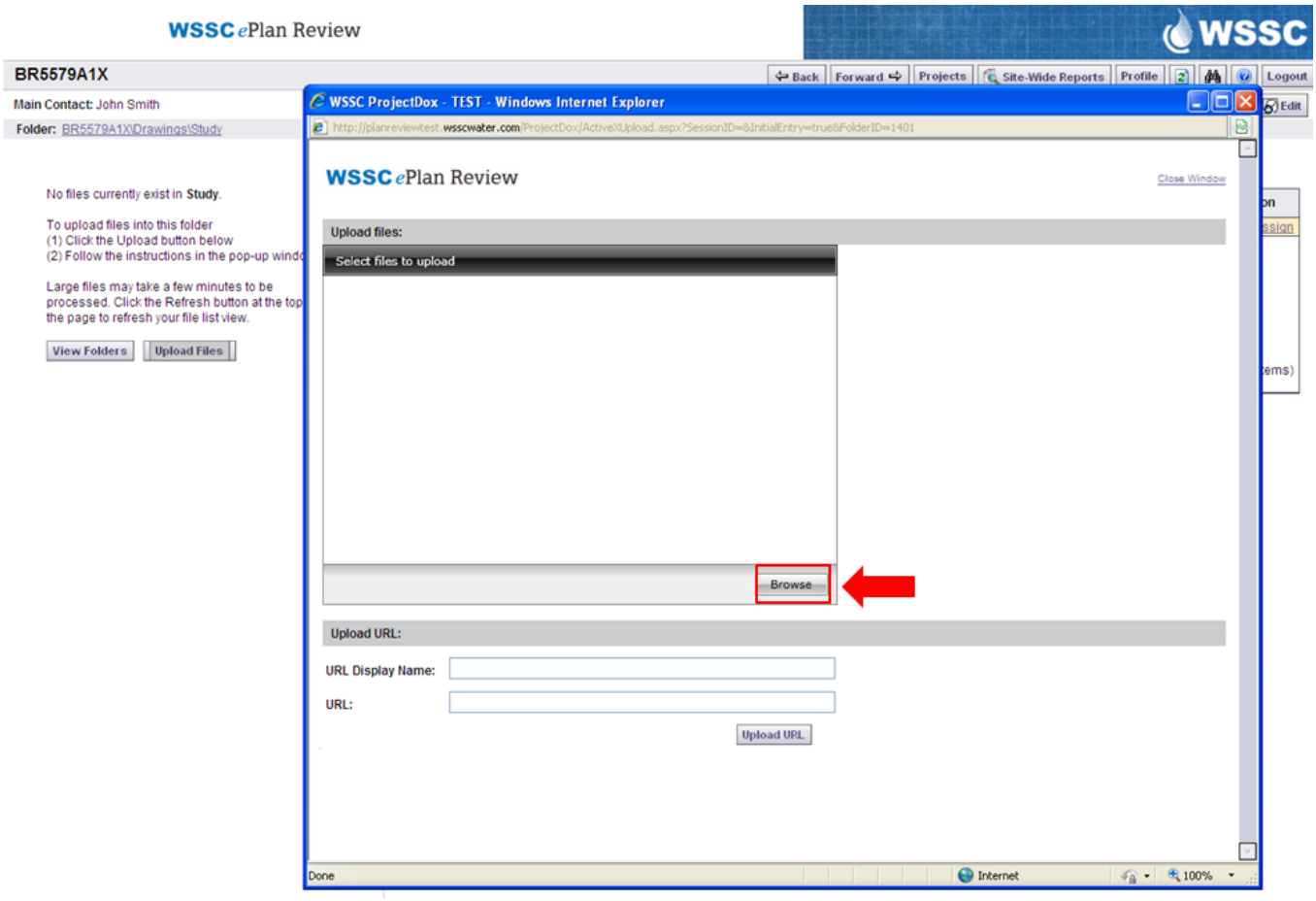
4. Minimize the eForm and click on the folder that represents the review stage. Expand the folder structure to get to the desired folder by clicking on the root. (Marked “+”)



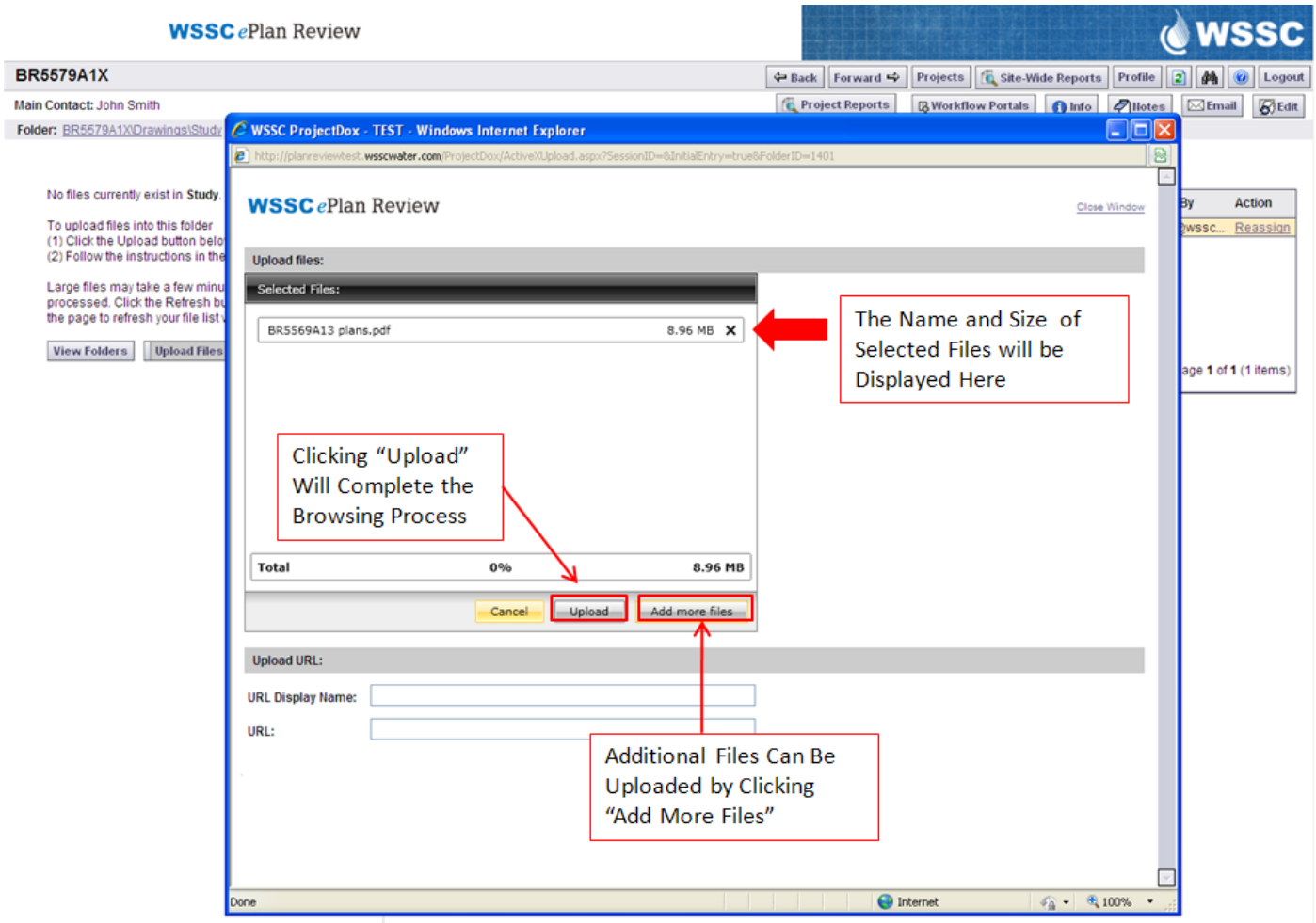
5. Click on the desired folder and then click on “Upload Files”



6. When the new popup windows appears, browse to where your files are located

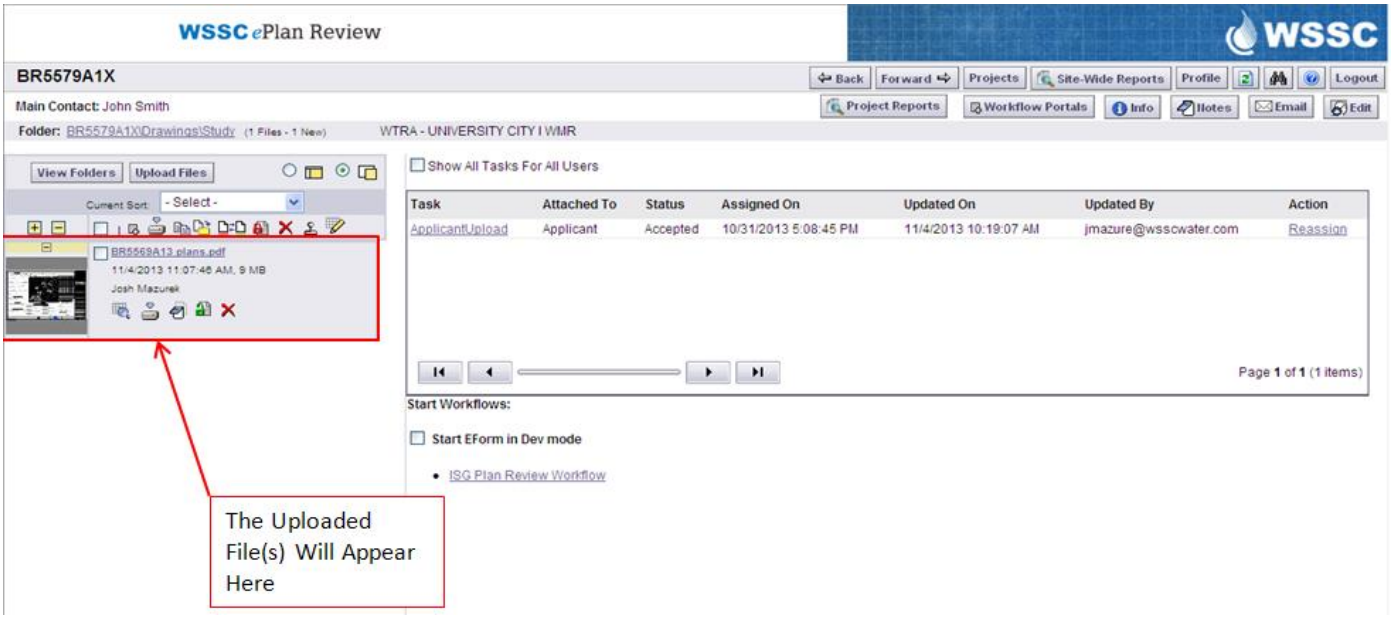


7. The file name and the size of the selected file(s) will be displayed. Once finished click on upload to complete the upload file(s) process.

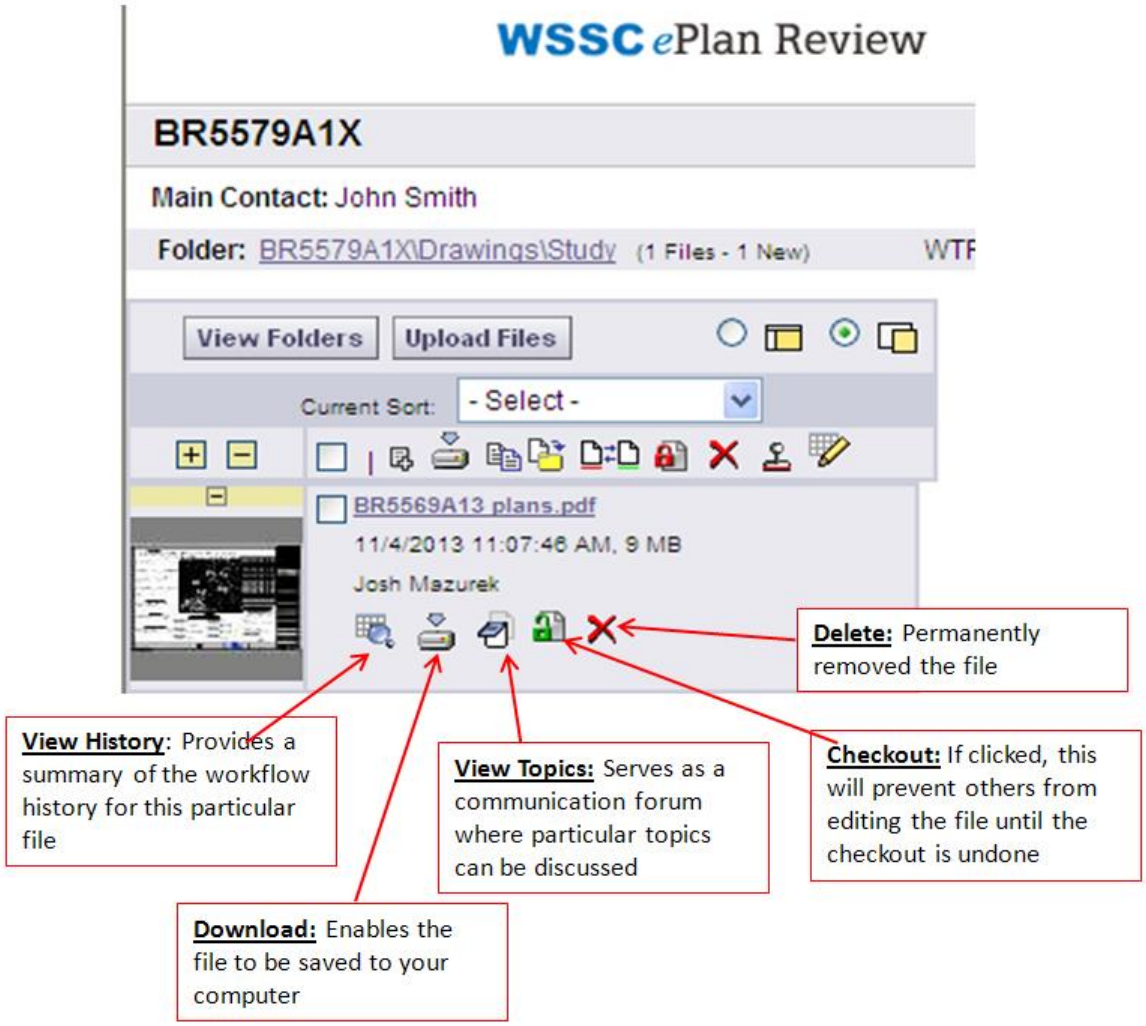


8. Close the popup window

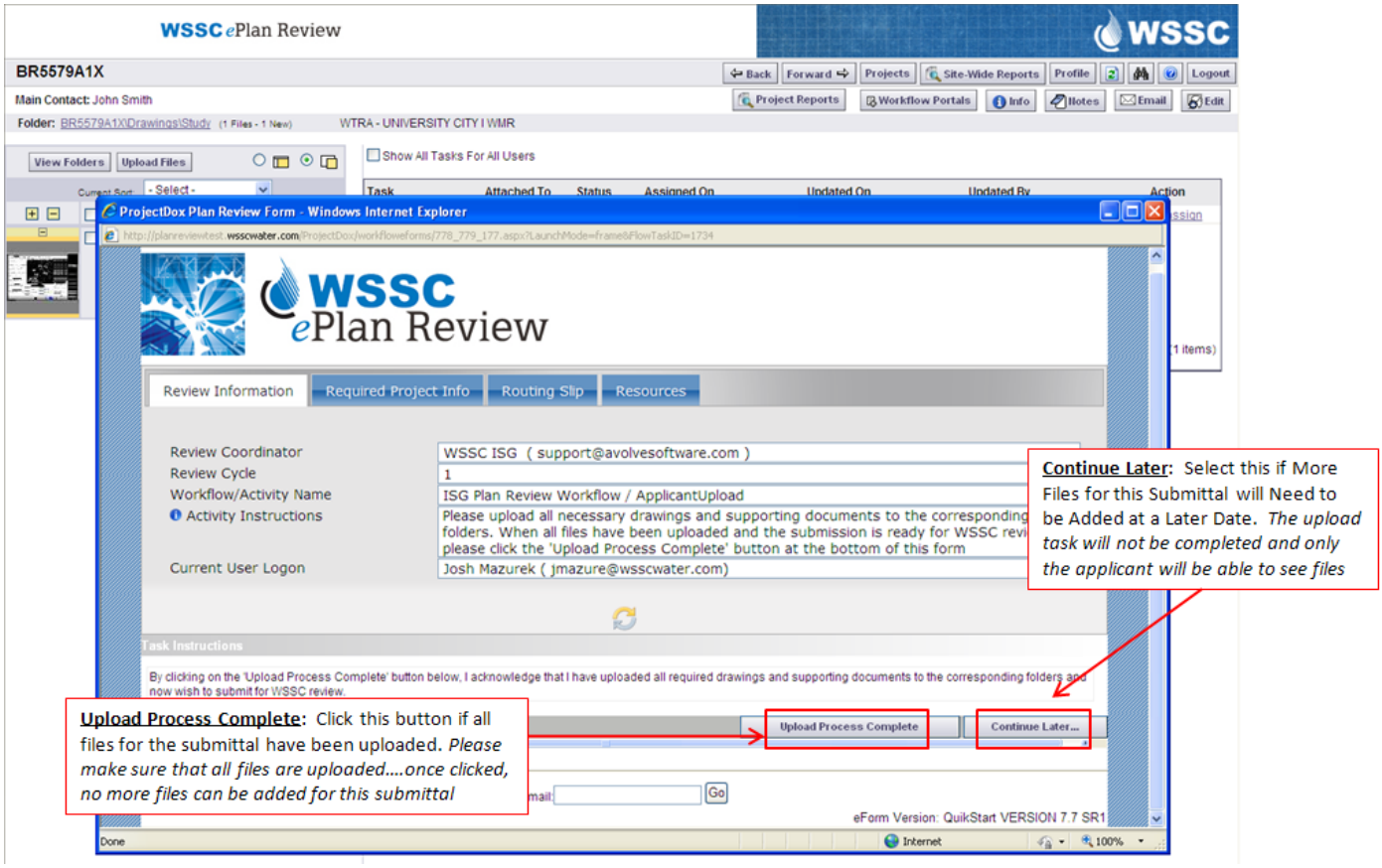
9. Verify your file(s) have been accepted by looking at the “uploaded files section on the left side.



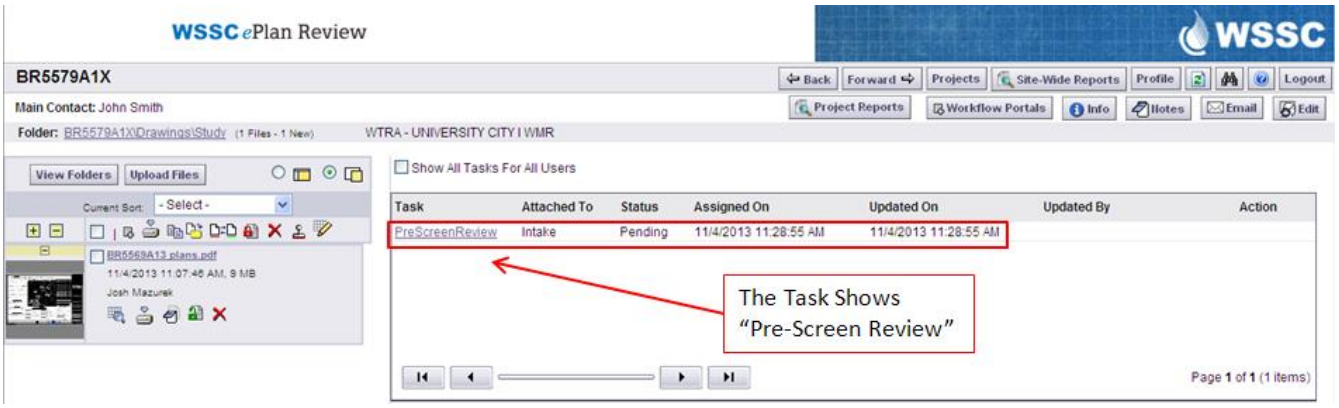
Information about the file(s) below


WSSC ePlan Review
BR5579A1X
Main Contact: John Smith
Folder: BR5579A1X\Drawings\Study (1 Files - 1 New)
WTF
View Folders
Upload Files
Current Sort:
- Select -
BR5569A13 plans.pdf
11/4/2013 11:07:46 AM, 9 MB
Josh Mazurek
Delete: Permanently removed the file
View History: Provides a summary of the workflow history for this particular file
View Topics: Serves as a communication forum where particular topics can be discussed
Checkout: If clicked, this will prevent others from editing the file until the checkout is undone
Download: Enables the file to be saved to your computer

10. Complete the application process by opening up the eForm described in step 3.


WSSC ePlan Review
BR5579A1X
ProjectDox Plan Review Form - Windows Internet Explorer
WSSC ePlan Review
Review Information
Required Project Info
Routing Slip
Resources
Review Coordinator
WSSC ISG (support@avolvesoftware.com)
Review Cycle
1
Workflow/Activity Name
ISG Plan Review Workflow / ApplicantUpload
Activity Instructions
Current User Logon
Josh Mazurek (jmazure@wsscwater.com)
Upload Process Complete
Continue Later...
eForm Version: QuikStart VERSION 7.7 SR1
Continue Later: Select this if More Files for this Submittal will Need to be Added at a Later Date. The upload task will not be completed and only the applicant will be able to see files
Upload Process Complete: Click this button if all files for the submittal have been uploaded. Please make sure that all files are uploaded....once clicked, no more files can be added for this submittal

This will complete the applicant upload task and the workflow will move on to Prescreen Review.



7. Prescreen review

Prescreen Review

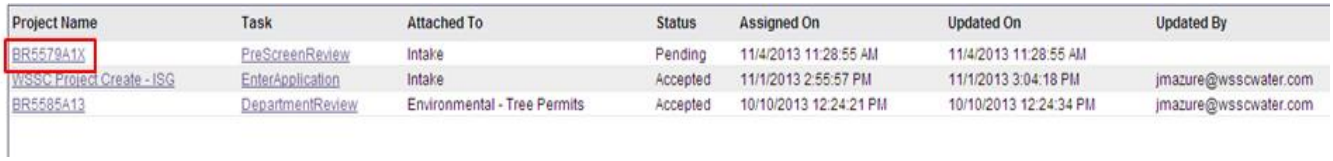
Participants: Review Coordinator Group

The Prescreen Review step is used to review the uploaded documentation in the project prior to assigning the review to the departments. It will verify that all documents required for review are properly uploaded by the Applicant and if files are missing or incorrect, the submittal can be rejected, which allows the applicant to resubmit

After the applicant upload is complete, the Review Coordinator is notified via email that a task has been assigned to him and a task has been placed on the task list in ProjectDox. The assigned task will show as “Pending” under the Status column of the task list until he accepts the Task. To “Accept” a task is to take responsibility to fulfill the requirement of the step in the process.

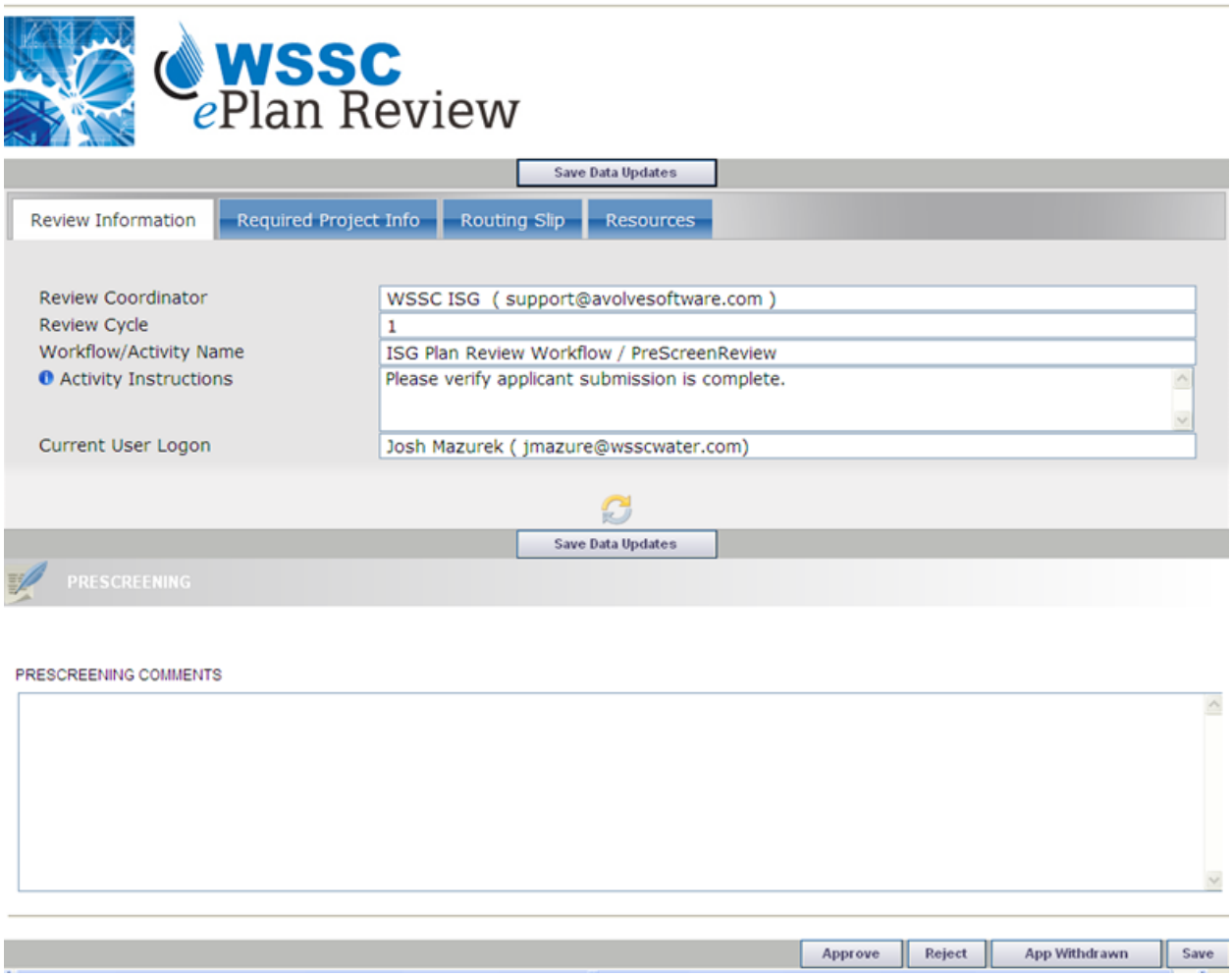
To complete the “***PreScreenReview***” step follow the below steps:

1. Log in to ProjectDox
2. Select the “**PreScreenReview**” link from the Task List shown under the column heading of Task. This can be done from the global or project specific task lists.



Project Name	Task	Attached To	Status	Assigned On	Updated On	Updated By
BR5579A1X	PreScreenReview	Intake	Pending	11/4/2013 11:28:55 AM	11/4/2013 11:28:55 AM	
WSSC Project Create - ISG	EnterApplication	Intake	Accepted	11/1/2013 2:55:57 PM	11/1/2013 3:04:18 PM	jmazure@wsscwater.com
BR5585A13	DepartmentReview	Environmental - Tree Permits	Accepted	10/10/2013 12:24:21 PM	10/10/2013 12:24:34 PM	jmazure@wsscwater.com

3. A dialog box will display “Do *you want to accept this task?* “. Select “**OK**” to accept responsibility for completing the task. Select “**Cancel**” to Close the eForm and keep the task as *“Pending*”.
   a) Accepting the task removes the assignment from other group members task lists.
   b) The ***Pending*** status will be updated to ***Accepted*** and show the name of the person performing the step in the “**Updated By**” Column.
   c) The Pre Screen eForm will display.

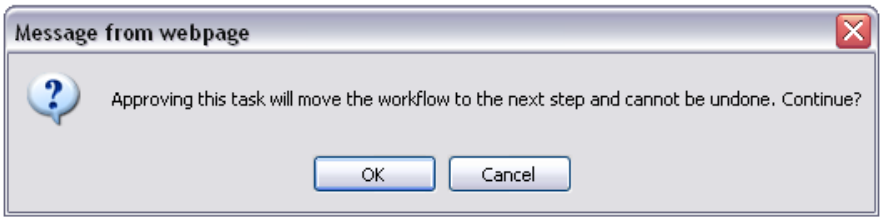


4. Minimize the eForm and navigate to the folders in ProjectDox and review the uploaded documentation based on your business rules to determine if the submittal will be "Approved" or "Rejected" and then select the appropriate button.
5. Button selection will determine the direction of the workflow:
   - APPROVE

     Selected when no additional information or corrections are required from the applicant and the submittal is ready to be routed to the departments for the formal review process to being.

     a) Click the **Approve** button.

     b) Click **OK** to the dialog box message to move to the next step in the process.


Message from webpage
Approving this task will move the workflow to the next step and cannot be undone. Continue?
OK
Cancel

c) The eForm will close and the workflow will progress to the “Begin Review” step used to route the review to the required departments.

d) The Review Coordinator Group will receive the Begin Review email notification and a task assigned to their task list.

e) The Project Status will be updated to “Submitted”.

- REJECT

The eForm contains many features that allow the Review Coordinator to communicate issues with the submittal to the applicant including free-form text box field and the ability to attach supporting documents to the eForm for the applicant to review.

Prescreening Comments

The prescreen comments text box is a free-from text box that allows the Review Coordinator to type information to the applicant about issues regarding the submittal. This information is in a read-only format when being viewed by the applicant.

Additional Features

Email PDF Copy of EForm

The bottom of the Form provides an email field that allows participants of the workflow to create and send a copy of the current state of the eForm. The email address indicated does not need to be a member of the project or the ProjectDox site.

Correction Complete

Participants: Applicant

This step is used to notify the Applicant of issues with the uploaded submittal and requests for more information and/or correction of information prior to the departments being assigned. This step is the responsibility of the Applicant and initiated by the Review Coordinator when the "Reject" button is selected in the pre-screen review. The Applicant will receive an email notification informing them of the resubmit request and instructing them to log in to ProjectDox to get more information. The Applicant should perform the below steps to complete the task.

1. Log in to ProjectDox.
2. Select the "**CorrectionComplete**" link from the Task List shown under the column heading of Task. This can be done from the global or project specific task lists.
3. A dialog box will display "Do you want to accept this task? ". Select "OK" to accept responsibility for completing the task.
   a) Accepting the task removes the assignment from other group members task lists.
4. Review the comments (if provided) in the text box.
   a) Revisions of documents should be uploaded using the same naming convention as the original file to allow for automated versioning of the file to occur.
5. Select the check box to indicate corrected items/documents have been uploaded. This action enables the "**Corrections Complete**" button to become enabled.
6. Select the "**Corrections Complete**" button
7. Select "**Ok**" to the dialog message "*Completing this task will finish your participation in this step and cannot be undone. Continue?"*
   a) Select "**Cancel**" to return to the eForm.
   b) Select the "**Ok**" button to complete the task and perform the following:
   - EForm will close.
   - Task removed from Applicant's task list.
   - Email notification sent to the Review Coordinator assigning a task to perform the prescreen review again.

8. Formal Review Process

BeginReview

Participants: Review Coordinator Group

The main function of this step is to route the review to the required departments/users. Once the pre-screen review is approved, an email notification is sent to the Review Coordinator and a task added to the user's task list. Upon selection of the task, the eForm will display all possible departments available to which the review can be assigned. While there are two types of assignment that can be used, all groups in the **Begin Review** step use the concept of First-In-Group (explained below).

First Selection Approach (FirstInGroup)

Review Coordinator assigns the review task to all Department Reviewers. The first Reviewer to select and accept the review task has it assigned to him/her. The review task is then removed from the other Department Reviewers' task lists.

Individual

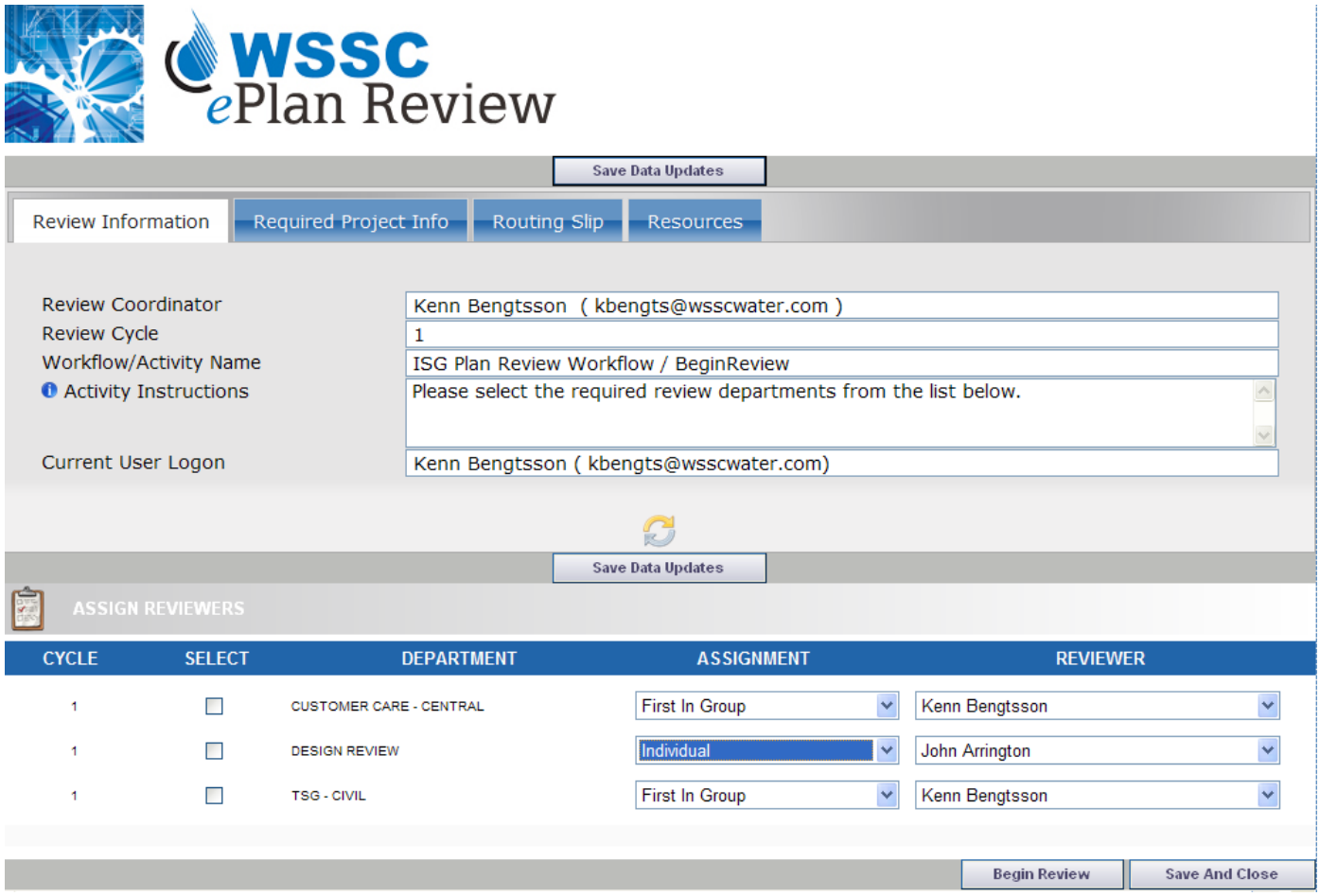
This option allows a Review Coordinator to assign a review task to a specific Reviewer. The Review Coordinator can review the application review request and decide who on their staff should complete the required tasks, based on Reviewer availability, skill set, etc.

1. Select the "***BeginReview***" link from the Task List shown under the column heading of **Task**. This can be done from the global or project specific task lists.

Project Name	Task	Attached To	Status	Assigned On	Updated On
AAwateranalysis	BeginReview	Intake	Pending	11/25/2013 2:24:25 PM	11/25/2013 2:24:25 PM
BRTestImplementation	PreScreenReview	Intake	Pending	11/14/2013 8:56:24 AM	11/14/2013 8:56:24 AM

2. A dialog box will display "*Do you want to accept this task?* ". Select "**OK**" to accept responsibility for completing the task.
   a) Accepting the task removes the assignment from other group members task lists and changes the Status from Pending to Accepted.

3. On the eForm, locate the **Select** column in the Assign Reviewers table to add departments.
   a) Add new departments by placing a check mark in the check box of the select column for the department.
   b) Deselect a department by removing the check mark from the check box for the department.



4. Select the **Begin Review** button. A dialog box will display “Completing this task will finish your participation in this step and cannot be undone." Continue? “.
5. Select **Ok** to initiate the review and send the email invite notifications to the selected departments and their corresponding users.
    a) The eForm will close, the task completed and the task removed from the users task list.

IMPORTANT

- Only departments with a check mark in the check box will be invited to the review.
- Once the **Begin Review** button is selected and the dialog response given, the Review Coordinator no longer has access to the eForm to add additional departments or make changes.

8.1 Additional Features

Change Assignment Type

When the eForm displays, three (3) columns are enabled for the Review Coordinator to make selections from: Select, Assignment, and Reviewer. Upon display of the eForm to the Review Coordinator, the Assignment column displays the intended assignment type (First In Group). The Review Coordinator can select the dropdown to change the assignment from *First In Group* to *Individual* or vice versa for exceptions in the assignment process. When changing the Assignment from First In Group to Individual follow the below steps.

1. Select the check box for the required department.
2. In the **Assignment** column select the dropdown box and choose *Individual* for the specific department.
3. In the **Reviewer** column, select the name of the single person that should perform the review for the selected department.

For changes from Individual to First In Group, use steps 1 and 2 above, changing the Assignment from Individual to First In Group.

Request for Additional Groups Received

A task can be assigned back to the Review Coordinator Group by a department while in the Department Review Step requesting an additional group added to the review. When a plan reviewer selects the "**Request Additional Groups**" button on the eForm (WF is in the Department Review step), a task is assigned to the Review Coordinator Group. The Review Coordinator receives an email notification stating in the subject line Additional Group Requested. The department reviews are not affected by this request; however, the **Request Additional Groups** button will be hidden from the reviewers until the Review Coordinator fulfills this request. A Review Coordinator should follow the below steps to complete this task:

1. Select the task from the task list and accept the task by selecting "**OK**" to the dialog message.
2. Review the ***Requested Groups*** section of the eForm for the group being requested.
3. Select the check box for the new department(s) to be assigned in the **Select** column of the Select Reviewers table.
4. Click the **Assign/Remove** Reviewers button.
    a) The **Assign/Remove Reviewers** button must be selected to initiate the invitation to the selected group.
5. Click the **Complete Group Request** button to close the eForm and complete the task.

Removing an Assigned Department

A department can be removed by a Review Coordinator when the **Request Additional Groups** button is selected as long as NO plan reviewer for the department has accepted the task. If the task for the department to be removed shows as Assigned, the below steps can be followed to remove a department.

1. On the eForm, remove the check mark from the **Select** Column of the Select Reviewers table on the eForm.
2. Click the **Assign/Remove** Reviewers button.
    a) The page will refresh, the row displayed in the Department Review table be removed, and the task be removed from the task list of the users associated to the group.
3. Click the **Complete Group Request** button to close the eForm and complete the task or follow the above steps to add an Additional Group.

IMPORTANT

- Departments cannot be added and removed in the same action. The addition or removal of users must be a done sequentially if both actions are required.

Reactivate Completed Task

The reactivate feature will allow a user who has completed their task to reaccept their task for an activity while others still have outstanding tasks in the same step in a running workflow (Department Review, for example: If there are 3 departments selected for department review, and user A completes their task and user's B or C or both have not completed their task, then user A can reaccept their task).

Reactivate usage notes:

- Reactivate allows a reviewer, for instance, to update notes/markups for review accuracy prior to activity completion.
- Department Reviewers can select the task and reactive to "In review" status.
- Department Reviewers notes and markups are maintained and can be updated after the task is reactivated.
- A candidate for Reactivation must be marked as complete and no other pending tasks for a different activity exist (otherwise the workflow will be considered having “moved on”).
- Reactivated tasks will be filtered for the user requesting them. (One user can't re-accept a completed task for another user; that would be a re-assignment)
- Once all reviews are completed, no requests can made to reactivate a task.
- If there is another task that is incomplete for the same activity that this user is on, and is for a different user than the person who is looking at it.
- It does not consider a single task that requires 100% completion. It ignores the percentage code

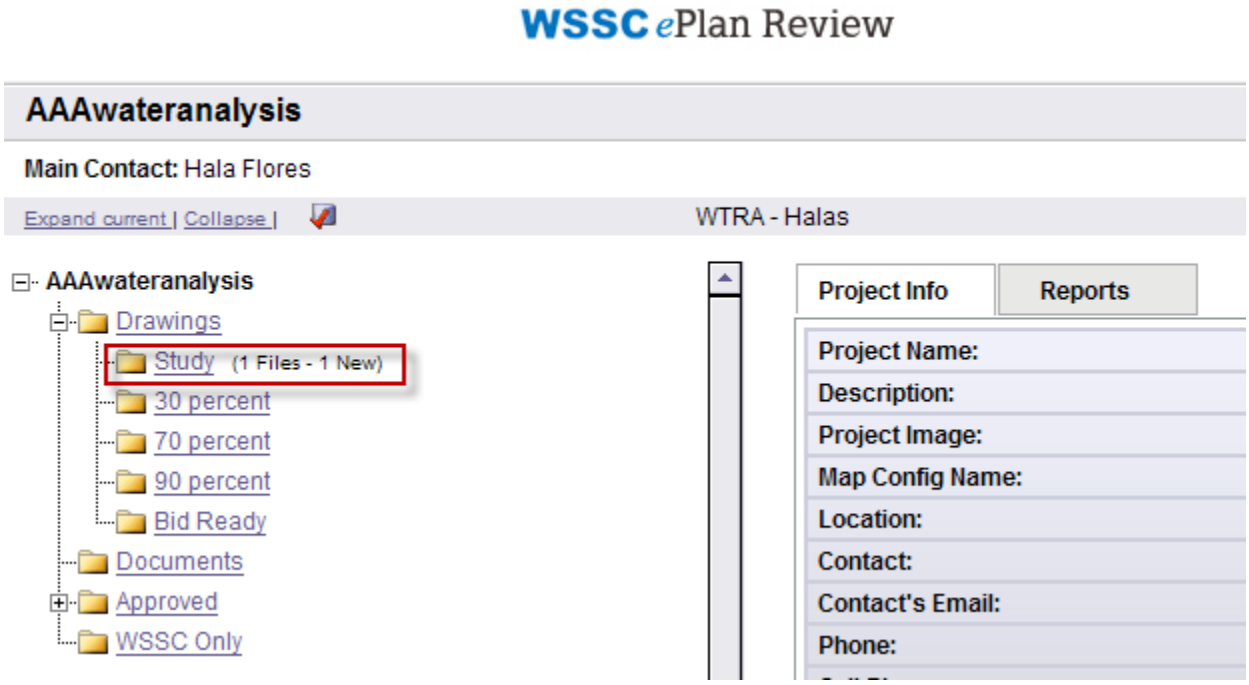
9. Department Review

Participants: Departments (Project Groups)

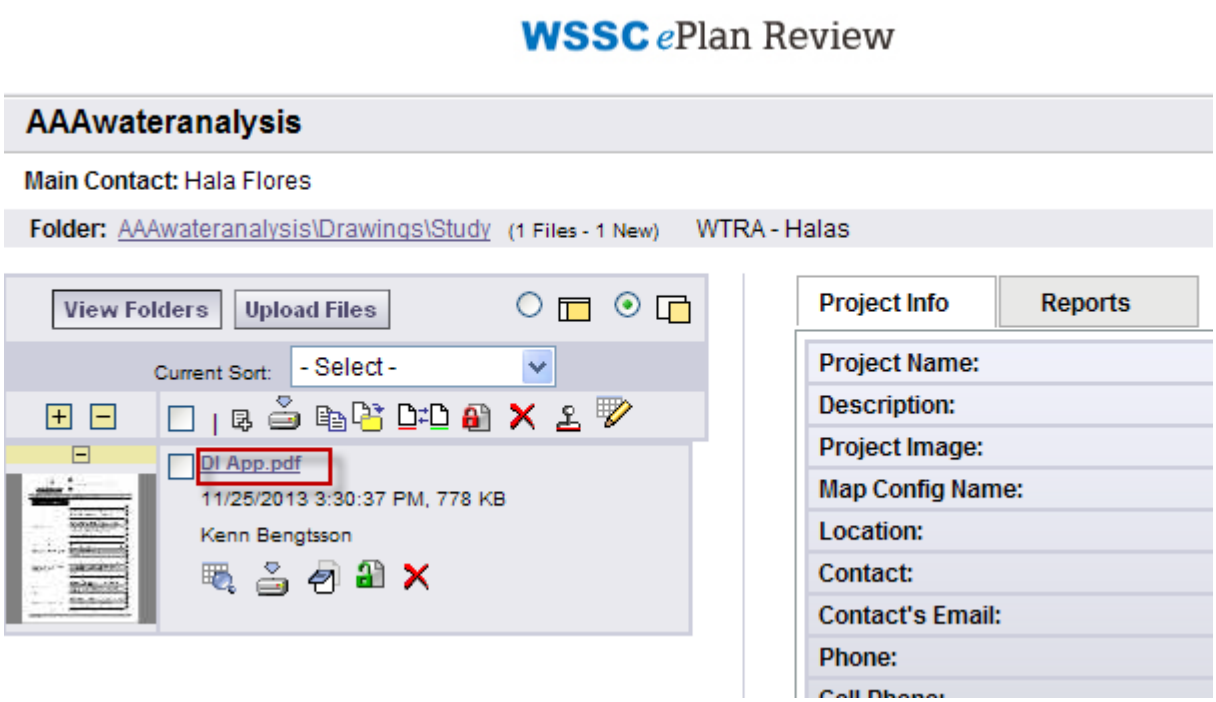
The selected departments and users will receive an email notification initiated by the Review Coordinator. The email received will indicate the project name, the step in the process they are invited to and the name of the Review Coordinator that invited them. All departments/users are notified at the same time and can perform the review in parallel; however, the review will not move to the next step in the process until all reviews are completed. If 10 departments are invited all 10 departments will need to complete their assigned task before the workflow will move to the next step in the process, QA Review.

4. Select the "**DepartmentReview**" link from the Task List shown under the column heading of Task. This can be done from the global or project specific task lists

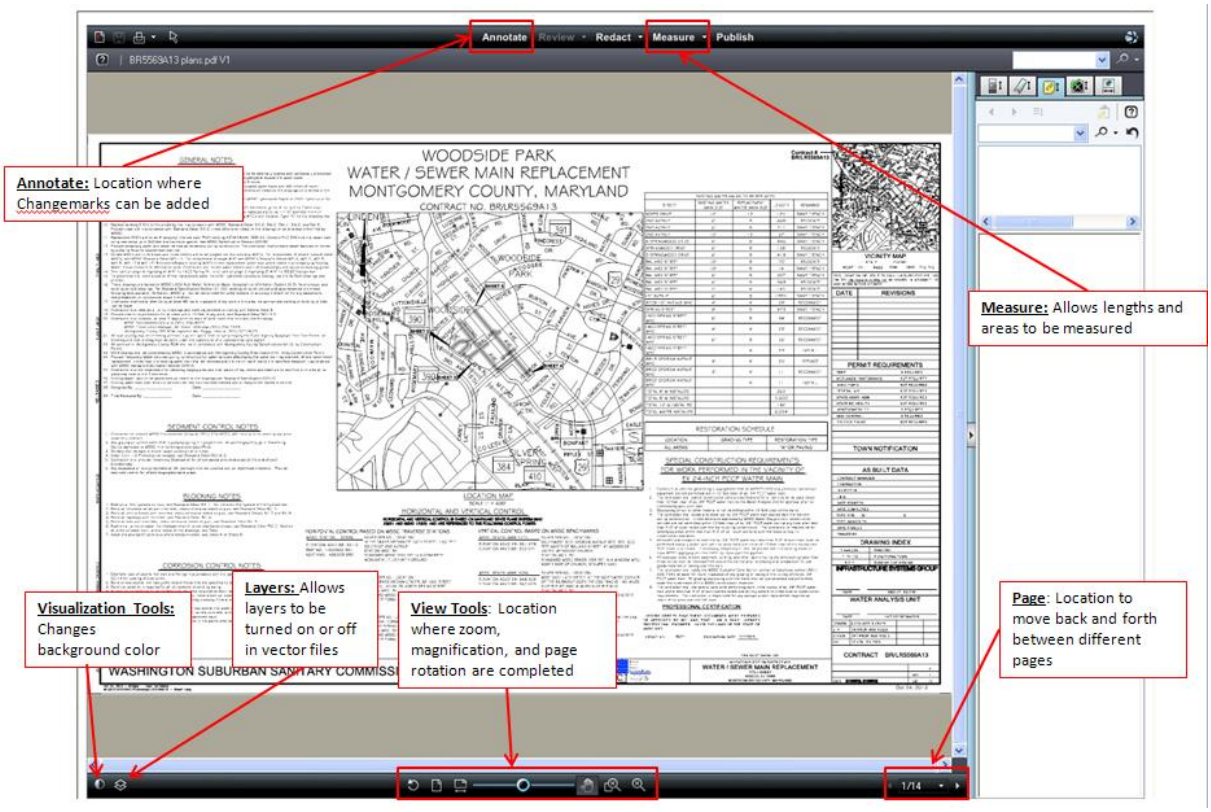
5. An eForm window pops up, follow the instructions.
6. Minimize the eForm and click on Projects button and then your Project
7. Select the drawing to be reviewed under the appropriate folder



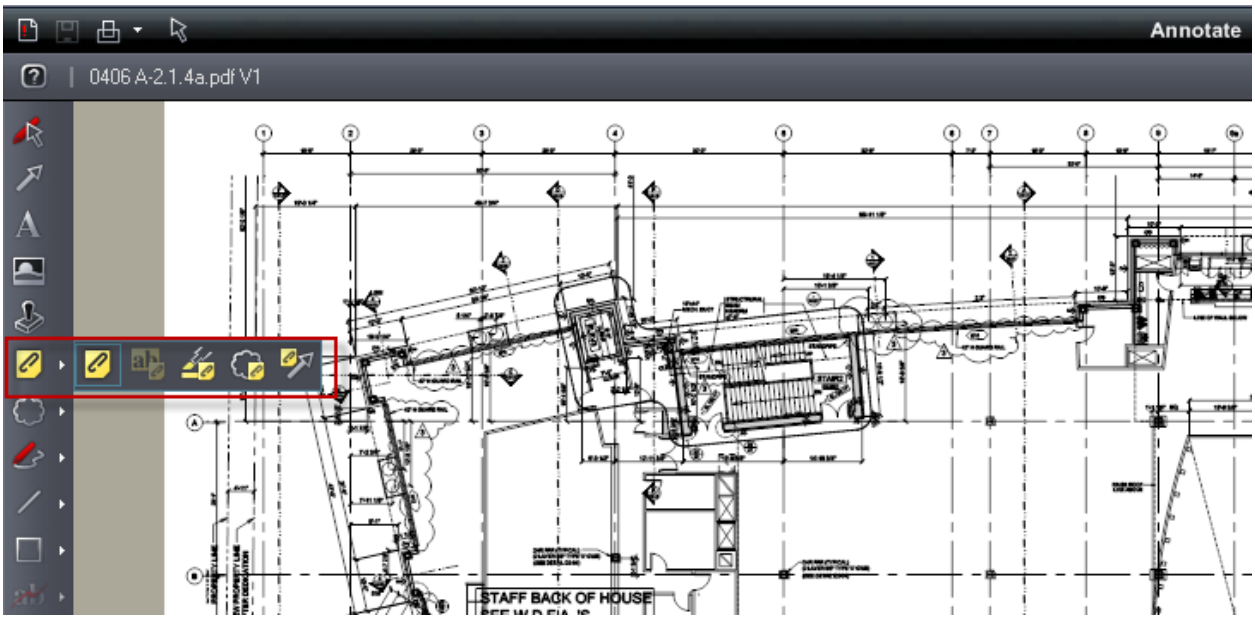
8. Click on the file to be reviewed



9. A new window opens up (Brava Viewer) which will be where you add comments.


Annotate
Review
Redact
Measure
Publish
Annotate: Location where Changemarks can be added
Measure: Allows lengths and areas to be measured
Visualization Tools: Changes background color
Layers: Allows layers to be turned on or off in vector files
View Tools: Location where zoom, magnification, and page rotation are completed
Page: Location to move back and forth between different pages
WOODSIDE PARK
WATER / SEWER MAIN REPLACEMENT
MONTGOMERY COUNTY, MARYLAND

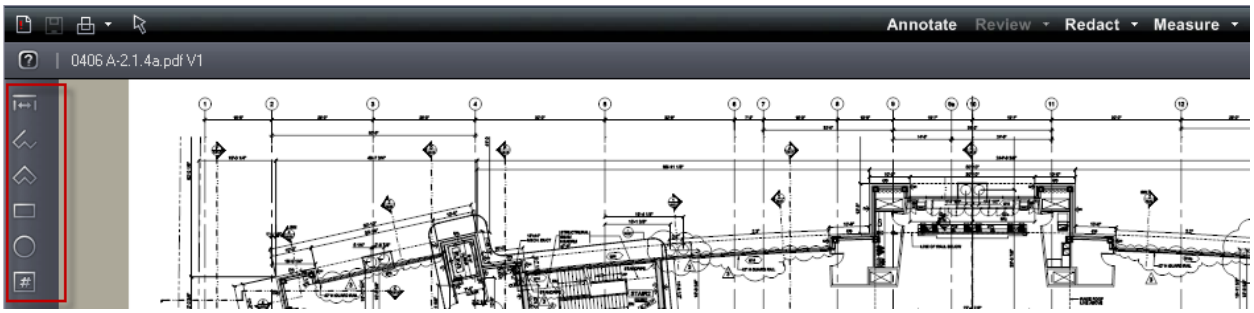
Annotation - The annotation has tools for creating Changemarks



Changemarks. The Changemarks tool allows markup authors to type or copy/paste in detailed text in a scrolling window. Authors can also add hyperlinks to point the user to additional information. Reviewers simply need to double-click on the markup entity while in select mode to review the text, or automatically scroll through each Changemarks contained in the Changemarks list by clicking a Next button. See Also "Changemarks Panel".

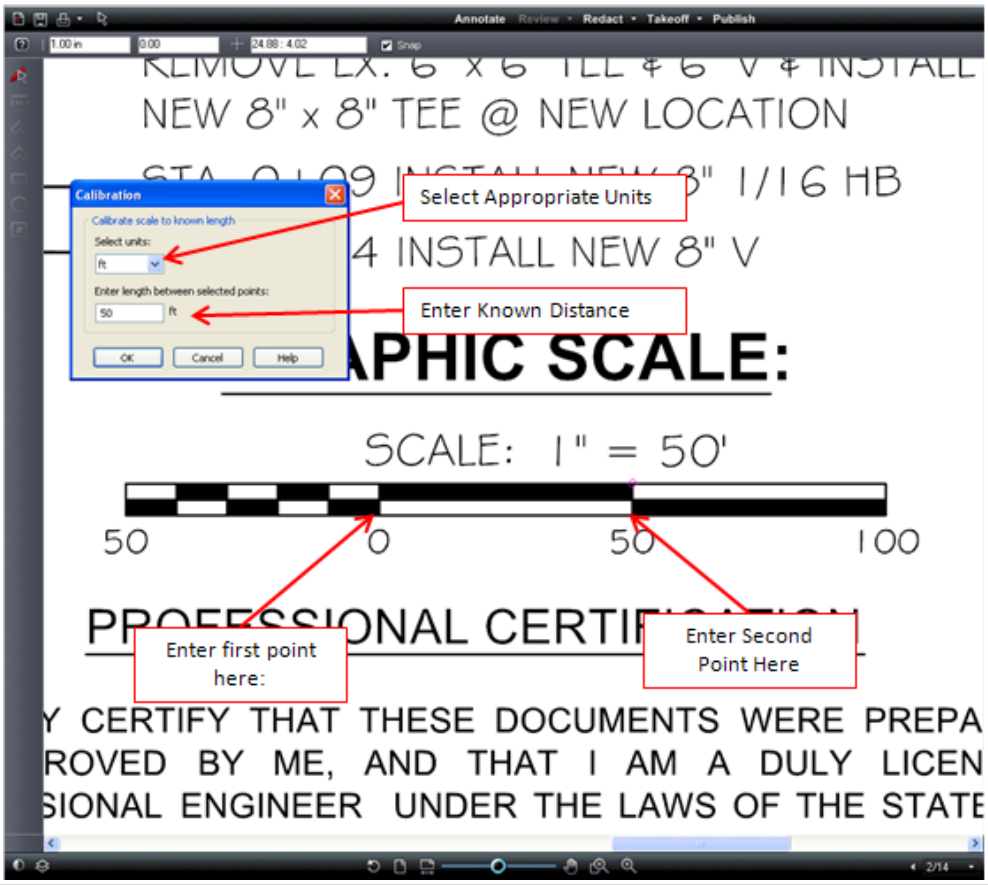
Changemarks combination tools: These tools are available purely for convenience. With a single click, you can add a Changemarks with either a *Highlight*, *Text Highlight*, *Cloud*, or *Arrow*. Once added, the two entities behave independent of each other. The Text Highlight is only enabled when text found on the file or document.

Measure – Measure toolbar contains tools for measurements purposes



Before measuring, calibration must be completed. To calibrate:

1. Click Measure → Calibrate
2. Locate the Graphic Scale on the Plans
3. Enter Points at Known Locations (e.g. on a 1”=50’), enter first point at 0, second point at 50
4. On the Calibration Window, Select Appropriate Units (Feet)
5. Enter length between selected points



Measure. Access commands for measurement and calibration. You can measure lines, polygons, circles, and rectangles, use the measure count feature, and access the measurement settings dialog.

Measurement Properties. Depending on the measurement tool selected from the menu (line, polyline, polygon, rectangle, circle, or count), various properties display for that measurement, including:

Distance *Angle* *X,Y Coordinates*

Perimeter *Area (poly)*

Height Area (rectangle)

Radius *Circumference* *Area (circle)*

Count

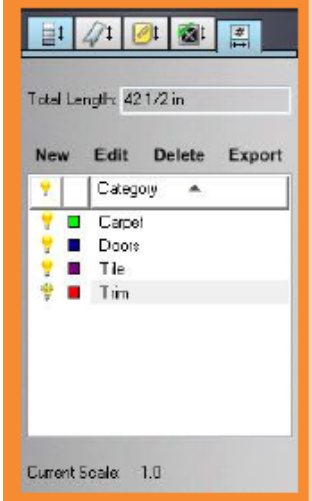
Clear All and **Undo Last** . Clears all or only the last count marker placed on an image.

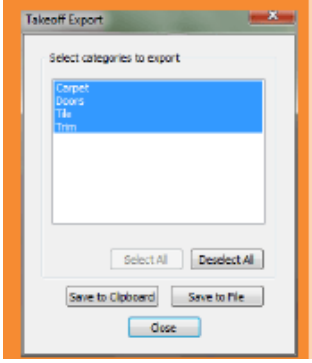
If **Show Leader** is selected, a text box (with category color border) will display each individual measurement result on the entities you

place.

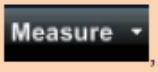
The **Negative Area** check box allows you to place a negative entity for that category. As long as the check box is selected, any entity you place on the drawing will subtract from the accumulated results. The measurement entities text box displays a negative number if Show Leader is selected.

You can select the **Snap** check box if you would like your measurement points to snap to the nearest picking point or to the midpoint of segments and circles. Note that only CAD type formats support snap. The setting has no effect on raster images and text documents.





Measure Takeoff

To access the Measure Takeoff panel, click or from the **Measure** button 

, select **Takeoff**.

You can create categories of different types (length, area, and count) and accumulate total measurement values for each category defined. Select **New** to define a new category through the *Takeoff Category* dialog. You can **Edit** or **Delete** a selected category if you are the author.

You can assign a different color for each category and the measurements placed on the document will display with that color.

The list of categories can be sorted by name (click Category in the top column). Click the ascending/descending arrow to arrange the list accordingly.

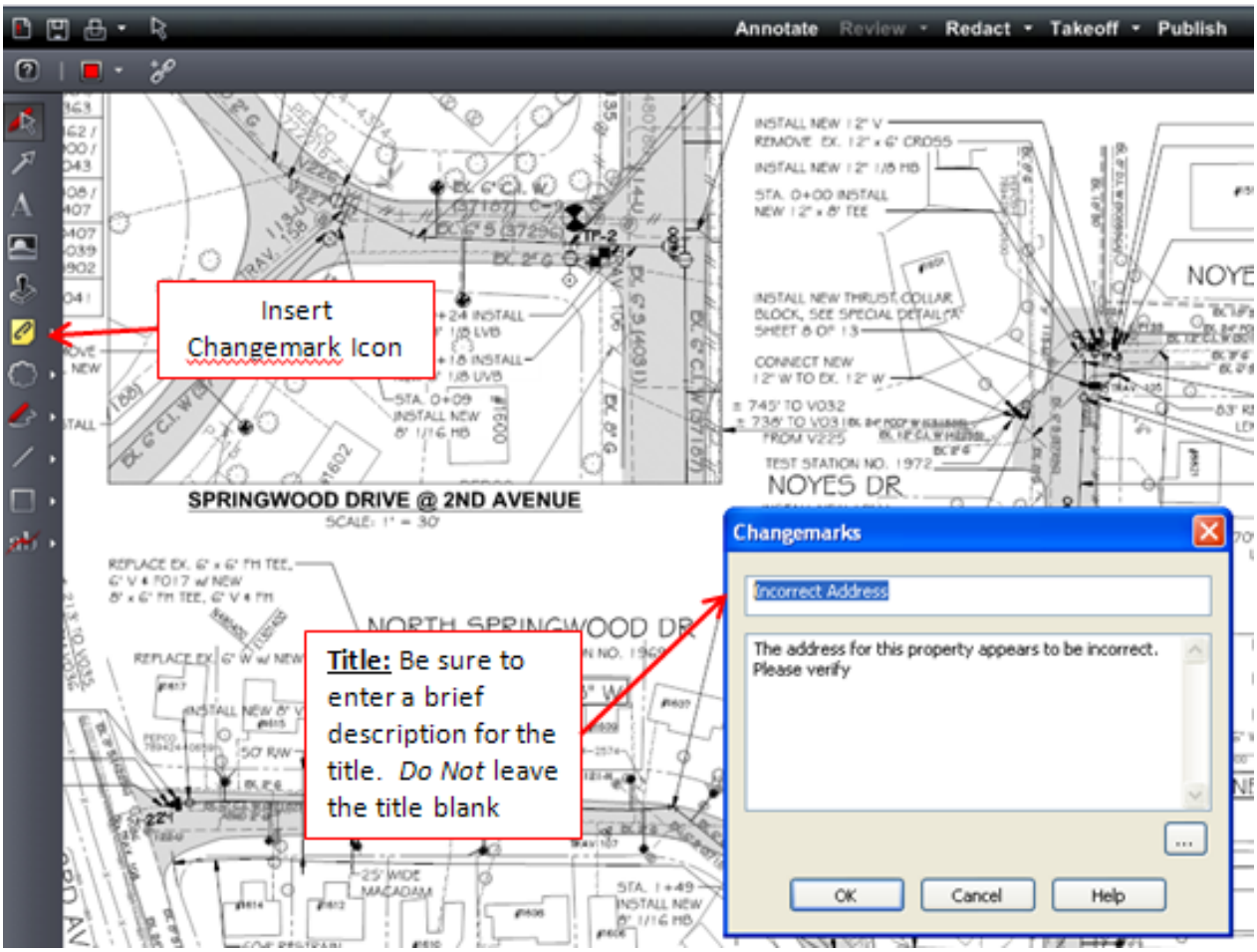
Once the categories are defined, highlight a category and use the available (dependent on type) measurement tools to place multiple measurements on the document. As you place each measurement entity, accumulated totals display at the top of the takeoff panel.

Takeoff information can be **Exported** to a file or to the Clipboard through the *Takeoff Export* dialog.

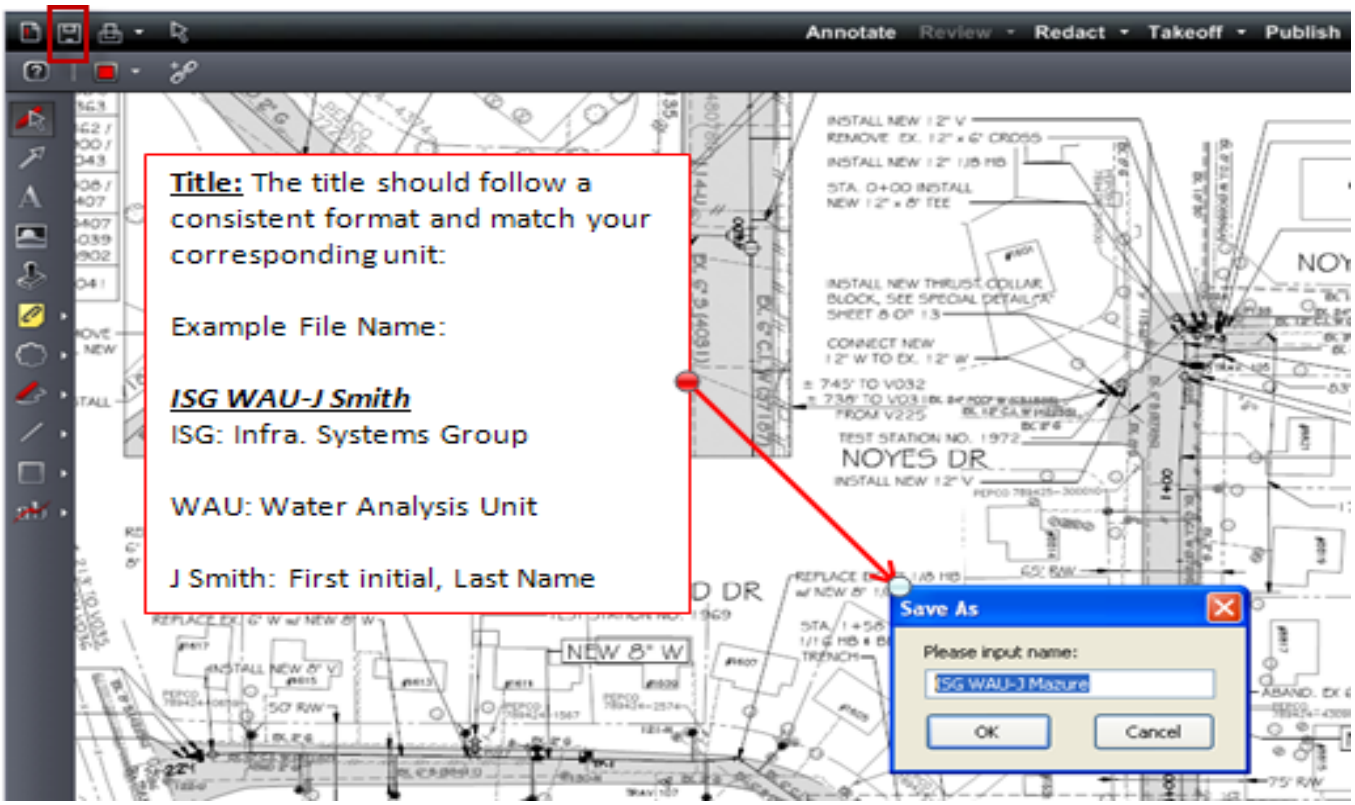
To hide a category, click the hide icon to toggle between visible and hide. To toggle all categories from visible/hide state, click the icon located in the column heading. Hidden category information will remain available for export.

Category and takeoff information is saved as a markup layer to the current file and can be reviewed as any other markup file.

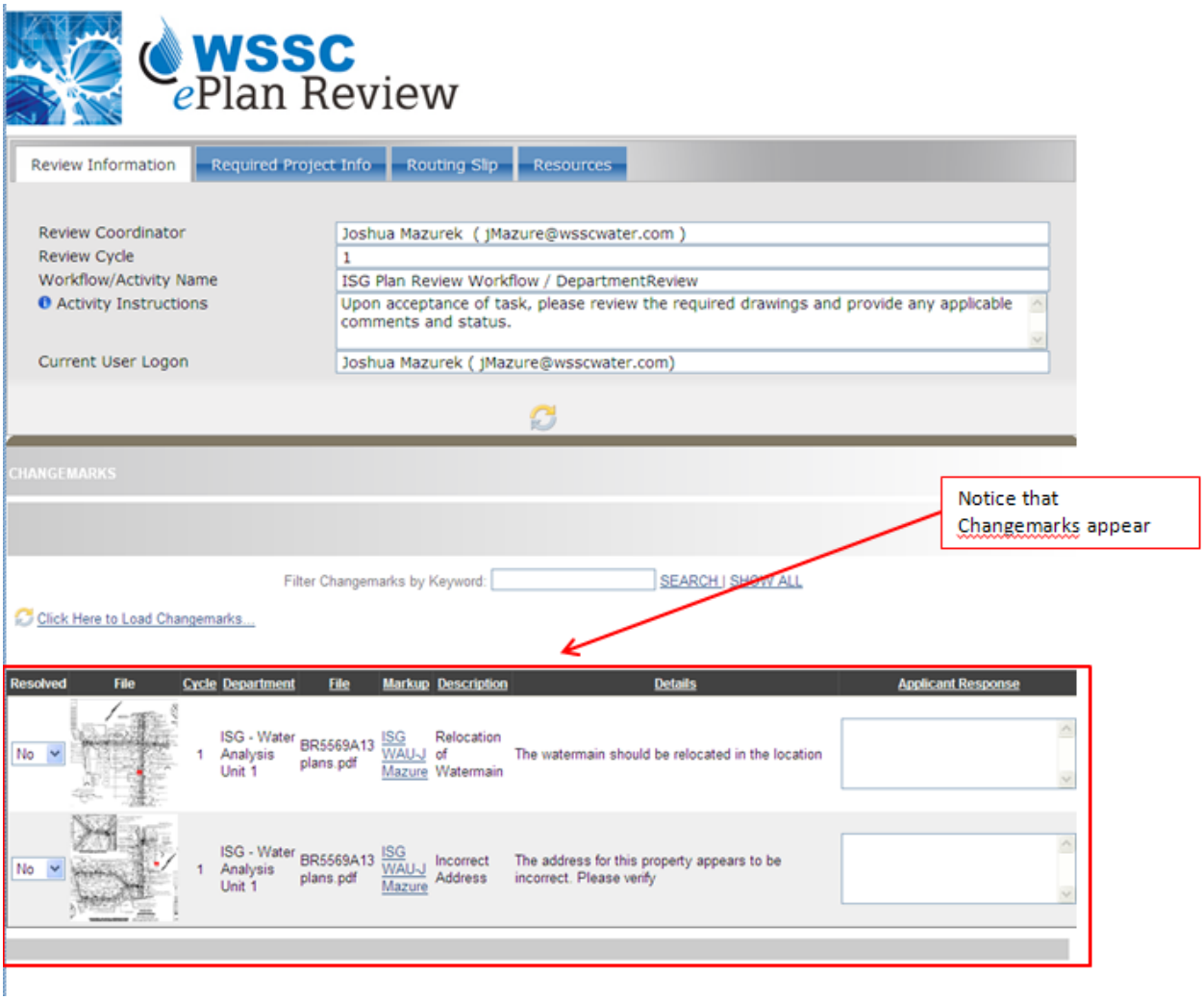
10. Add changemarks as comments



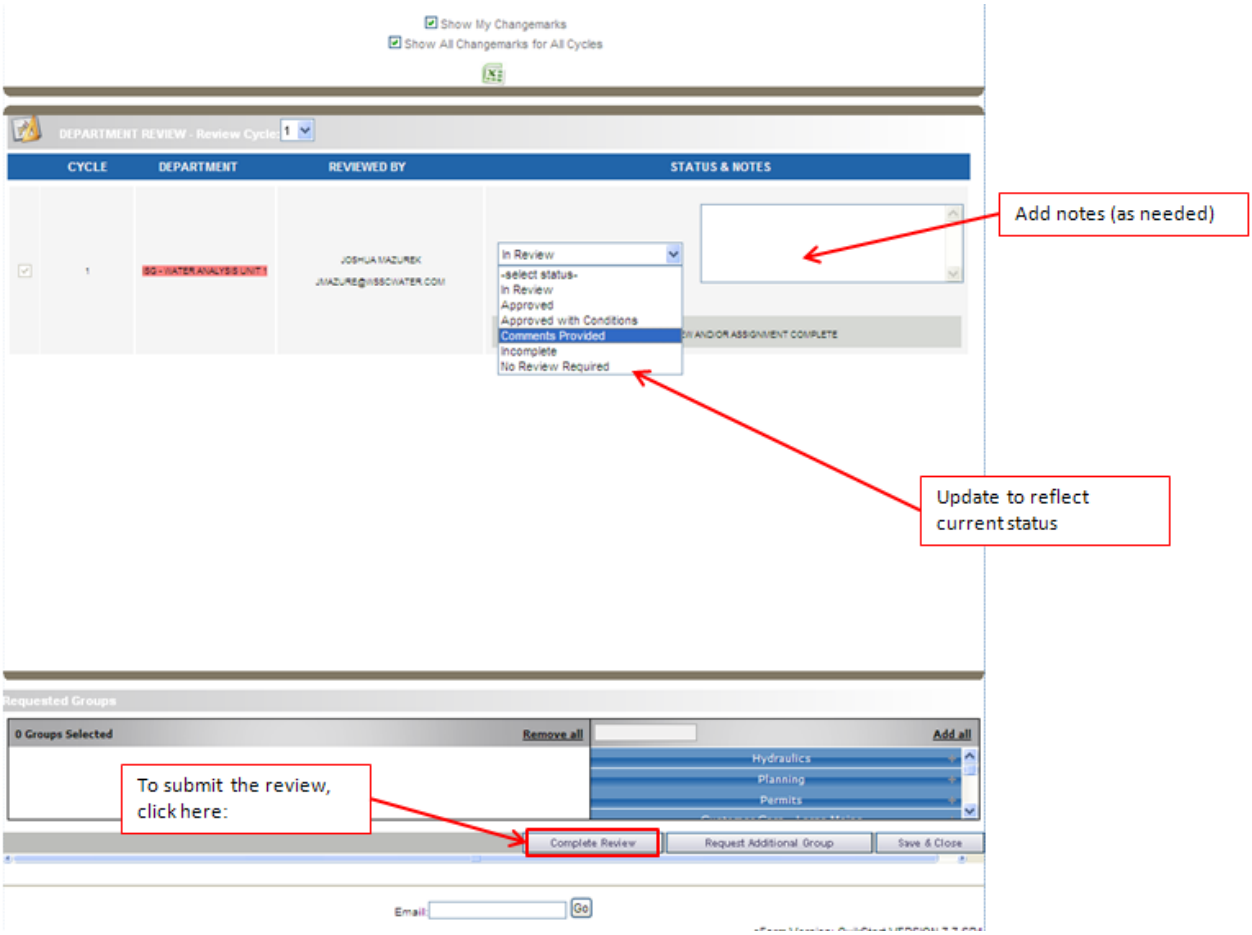
11. Once all comments have been added you have to click Save



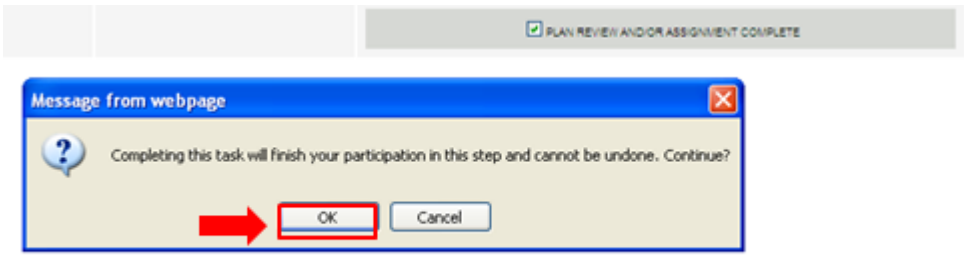
12. Once all comments are saved and you have closed the Brava Viewer, reopen the eForm again



13. Complete the review by changing review status and then click on Complete review.



Click OK to confirm.


PLAN REVIEW AND/OR ASSIGNMENT COMPLETE
Message from webpage
Completing this task will finish your participation in this step and cannot be undone. Continue?
OK
Cancel

IMPORTANT

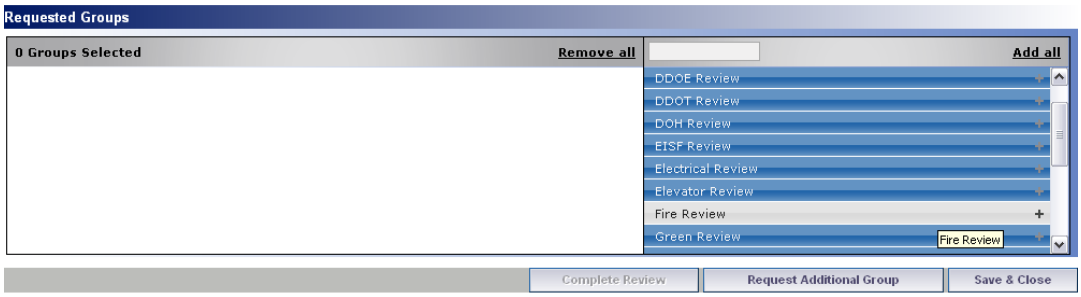
- Once the plan reviewer selects OK to the dialog the task is removed from the user's task list and the form cannot be accessed by the plan reviewer. If changes are needed the plan reviewer should contact the Quality Assurance individual who can return the form to the user once all reviewers have completed their reviews.
- The review step is tracked for time and configured so all reviews must be completed within 12 days from the date it was assigned by the Review Coordinator. If not all reviews are completed in the specified time frame the WF will "Time Out" prompting ProjectDox to send an email notification to the Management and Review Coordinator Groups. The workflow will remain in the Department Review step allowing the department to be completed.
- A Project or System Administrator can reassign a task that has been accepted but not completed to another member of their team.

ADDITIONAL FEATURES

Request Additional Groups

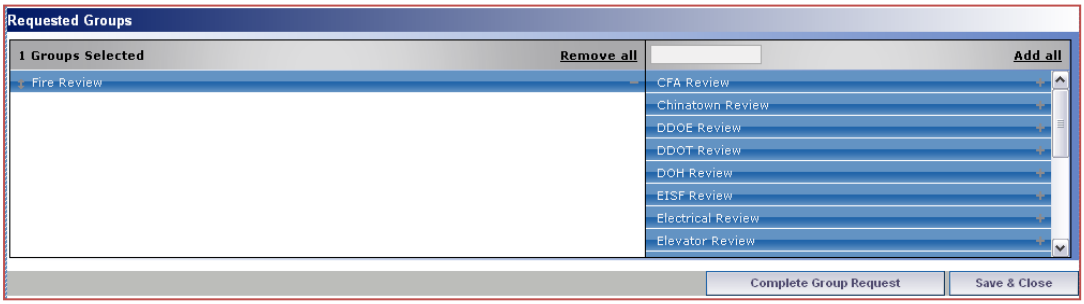
Selection of the "**Request Additional Groups**" button assigns a task to the Review Coordinator Group allowing them access to the eForm in the Department Review step to add a missing department to the review. The Review Coordinator can be notified, using the Requested Groups section of the eForm. Once a reviewer selects the "Request Additional Groups" button, it is removed from the eForm for all plan reviewers in the workflow until the Review Coordinator completes the request. Reviewers can continue to perform their review after selection of this feature.

1. Select the + sign to add the group or groups to the Groups Selected box.
   a) Use the box to enter a review agency and click enter to search the list of options



2. Select the "Request Additional Groups" Button

a) When the Review Coordinator accesses the eForm, the requested groups will be displayed.

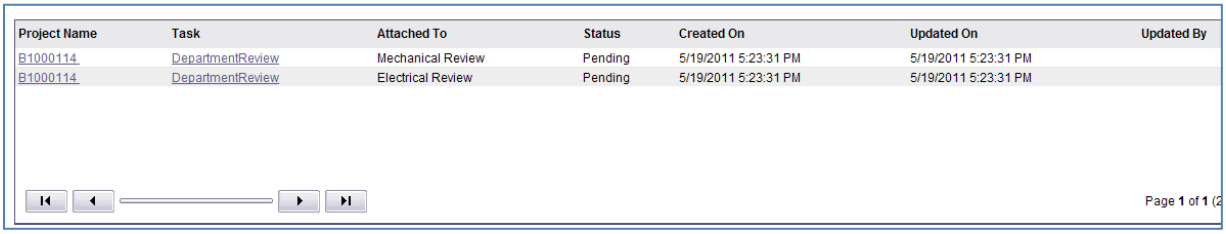


Department Review - Completing the Review for Multiple Departments

In some cases, reviewers are associated to multiple departments and therefore multiple reviews. In these instances, ePlan has some additional steps to associate a user in this situation to a particular review. Here is what you can expect.

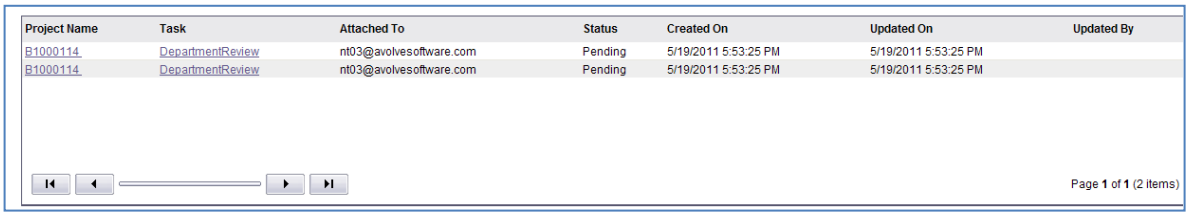
A reviewer associated with multiple departments, and invited to perform multiple reviews will see a task on their task list for each review. The task list display is slightly different depending on the type of assignment being used. If the concept of First In Group is used when the task is viewed on the task list, the **Attach To** column will show the department name for each task and will treat the reviews as separate.

First in Group Assignment



If a reviewer is invited as an Individual, two tasks are received with the **Attach To** column showing the reviewer's name but there is no indication associating a department to a task. In those cases, an additional step is required to associate the department to the review, using the **Assign Group** section of the eForm prior to gaining access to review the eForm.

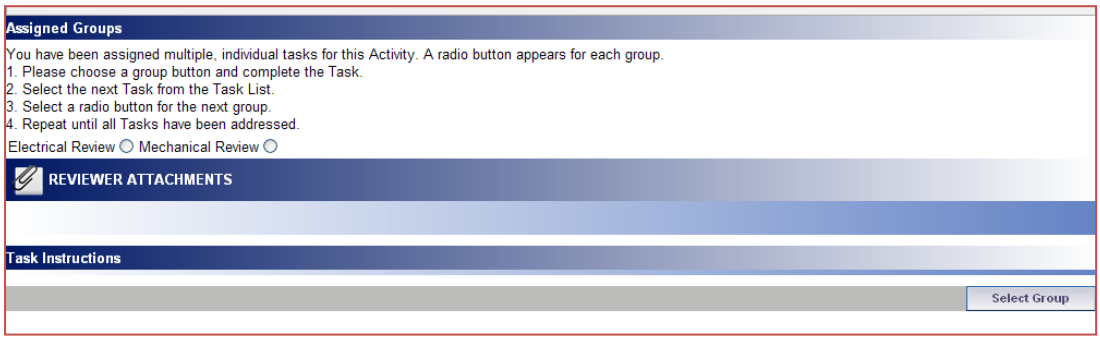
Individual Assignment



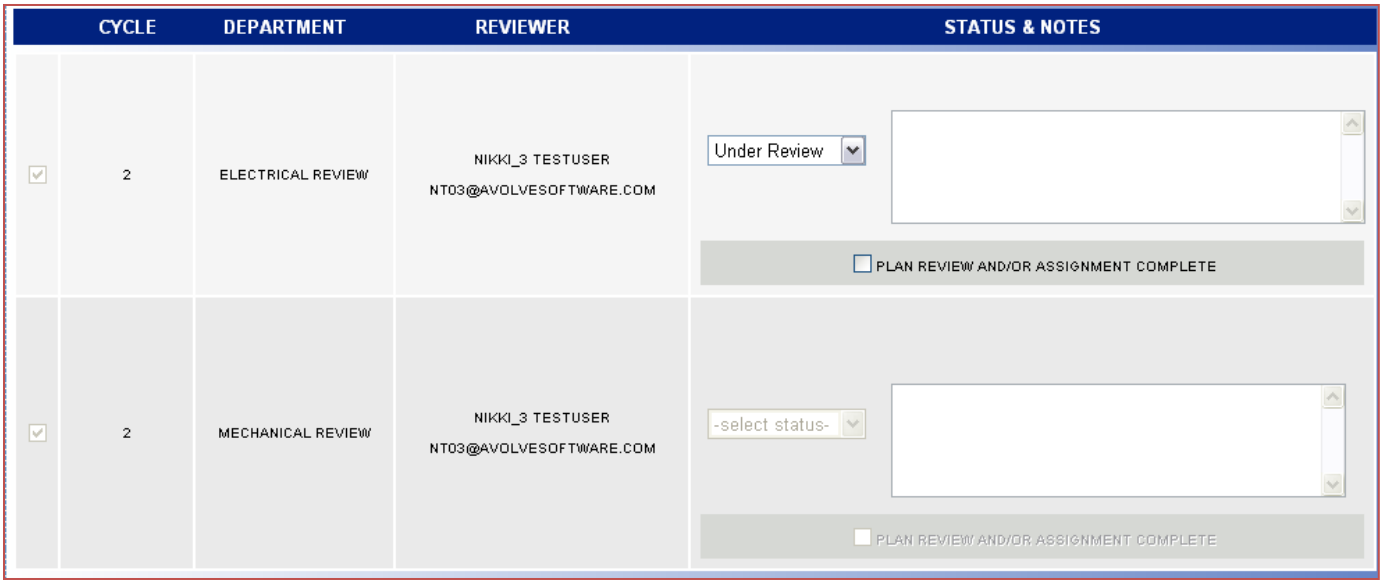
For reviewers whose initial invitation to the project is done as a *First in Group* prior to the start of the second review cycle the invitations are converted to Individual assignments allowing the original reviewer who accepted the review in cycle 1 to be the point of contact for the review for each subsequent cycle. This means that the reviewers will need to associate a selected task to a department using the "**Assign Groups**" section of the eForm before gaining access to the review eForm starting in the second review cycle.

To complete a review where there are multiple assignments follow the below steps:

1. Select the task link "**DepartmentReview**" found under the heading **Task** on the Task List and accept the task by selecting "OK" to the dialog message.
2. The **Assigned Groups** section of the form will display. Select the department you wish to perform the review for by selecting the Radio button.
3. Select the "**Select Group**" button to accept the review for this agency.


Assigned Groups
You have been assigned multiple, individual tasks for this Activity. A radio button appears for each group.
1. Please choose a group button and complete the Task.
2. Select the next Task from the Task List.
3. Select a radio button for the next group.
4. Repeat until all Tasks have been addressed.
Electrical Review
Mechanical Review
REVIEWER ATTACHMENTS
Task Instructions
Select Group

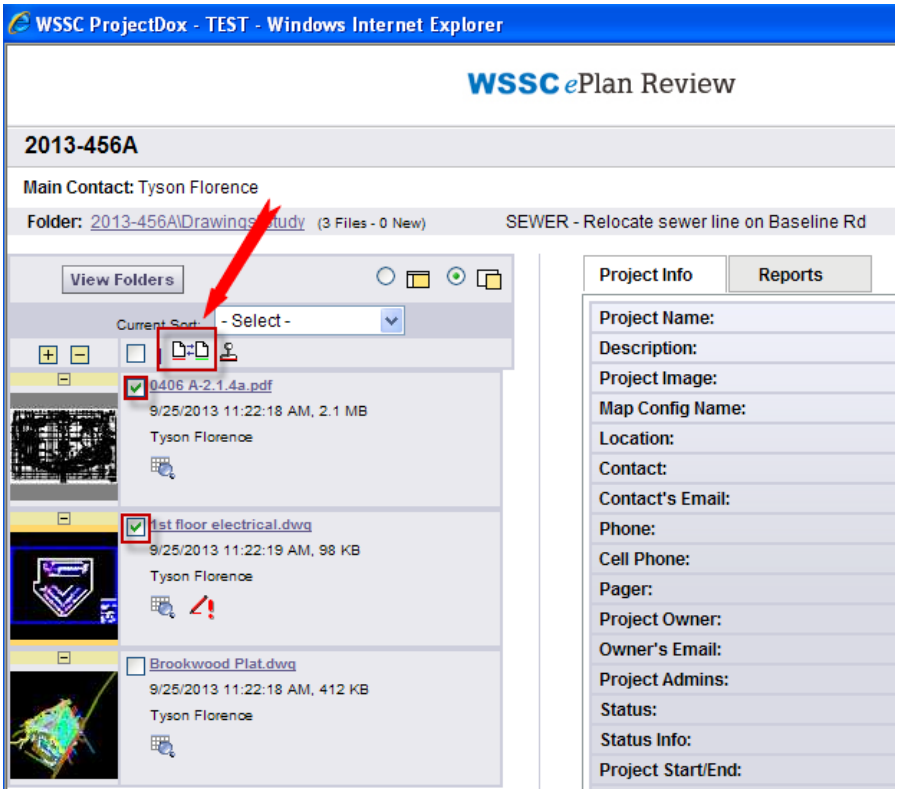
4. The eForm will display a row in the department review table that will allow for the selection of a status for the review and comments to be added.
5. The same steps as indicated in the "Department Review – completing a review" section are used.



Comparing files

You can select two file versions contained in the thumbnails list and open them for comparison. The Brava viewer Overlay Compare feature allows you to perform a graphical or textual comparison of two file versions.

1. Select the two files you would like to view in Compare mode and click the Compare button.



2. Brava launches in Compare mode, with side by side as the default view. The files will always display from oldest to newest version, with the oldest in the far left position. Two versions of the files can be compared by overlay, side by side, added or deleted information only, and more from the drop down list of the Compare toolbar. In overlay view, the older file displays in red and the newer file displays in green for easy identification (unchanged areas display in grey).
   The Comparison toolbar appears at bottom of viewing window. The toolbar contains various buttons for different viewing options. Depending on the viewing option currently chosen, alignment buttons (nudge alignment, set alignment points, and clear align), and a transparency slider may be present. Note that while viewing in Compare mode, most of the functionality associated with Annotate, Review, Redact, Measure, and Publishing (except Save View as JPG) will not be available for use.

Overlay
Use this button to overlay both versions on top of each other. Use the slider to change the transparency of each file - left to dim the compare version, right to dim the open version.

Overlay Differences
With this button, the compare file version opens overlaid on the open file. The open file displays in **red** (deleted geometry or text), and the compare file displays in **green** (added geometry or text). Geometry/text that has not changed (common between both revisions) is **gray**.
Use slider to change transparency for clearer visibility of the file differences - right to dim **red** (deleted) areas, left to dim **green** (added) areas.

Side-By-Side
Both versions are displayed in a split-screen view. Move the slider to view transparent differences overlaid in each version.

Text Comparison
While a graphical comparison is useful for viewing differences in CAD drawings (as overlaid images), this method has limitations when it comes to comparing the actual text contained in a document file. Use the Text Comparison mode to view the (non WYSIWYG) text content comparison of the open and compare documents.

Open File (Only)
Only the file that was first opened is displayed (normal colors). The set alignment points for comparison tool are available in this mode. All Annotate, Review, Redact, Measure, and Publish features are supported in this compare mode only.

Compare File (Only)
Only the file that was opened for compare is displayed (normal colors). The set alignment points for comparison tool are available in this mode. Measure and Publish features are supported in this compare mode.

Additions
Only added areas (areas present in the compare version, but not in the open version) are displayed in **green**.

Deletions
Only deleted areas (areas present in the open version, but not in the compare version) are displayed in **red**.

Unchanged
Only areas that are present in both the compare version and open version are displayed in **gray**.

Transparency Slider
This tool is available for Overlay, Overlay Differences, and Side-by-side modes to adjust the transparency amount of the two documents. In the two overlay modes, move the slider to the left to reduce the transparency of the Compare document (additions), move the slider to the right to reduce the transparency of the Open document (deletions). When the slider is centered, both documents display at 50% transparency.

In Side-by-side mode, center the slider to view the changes side by side, overlaid at 25% transparency. Move the slider all the way to the left to view 50% transparency, or all the way to the right for 0% transparency (no overlay).

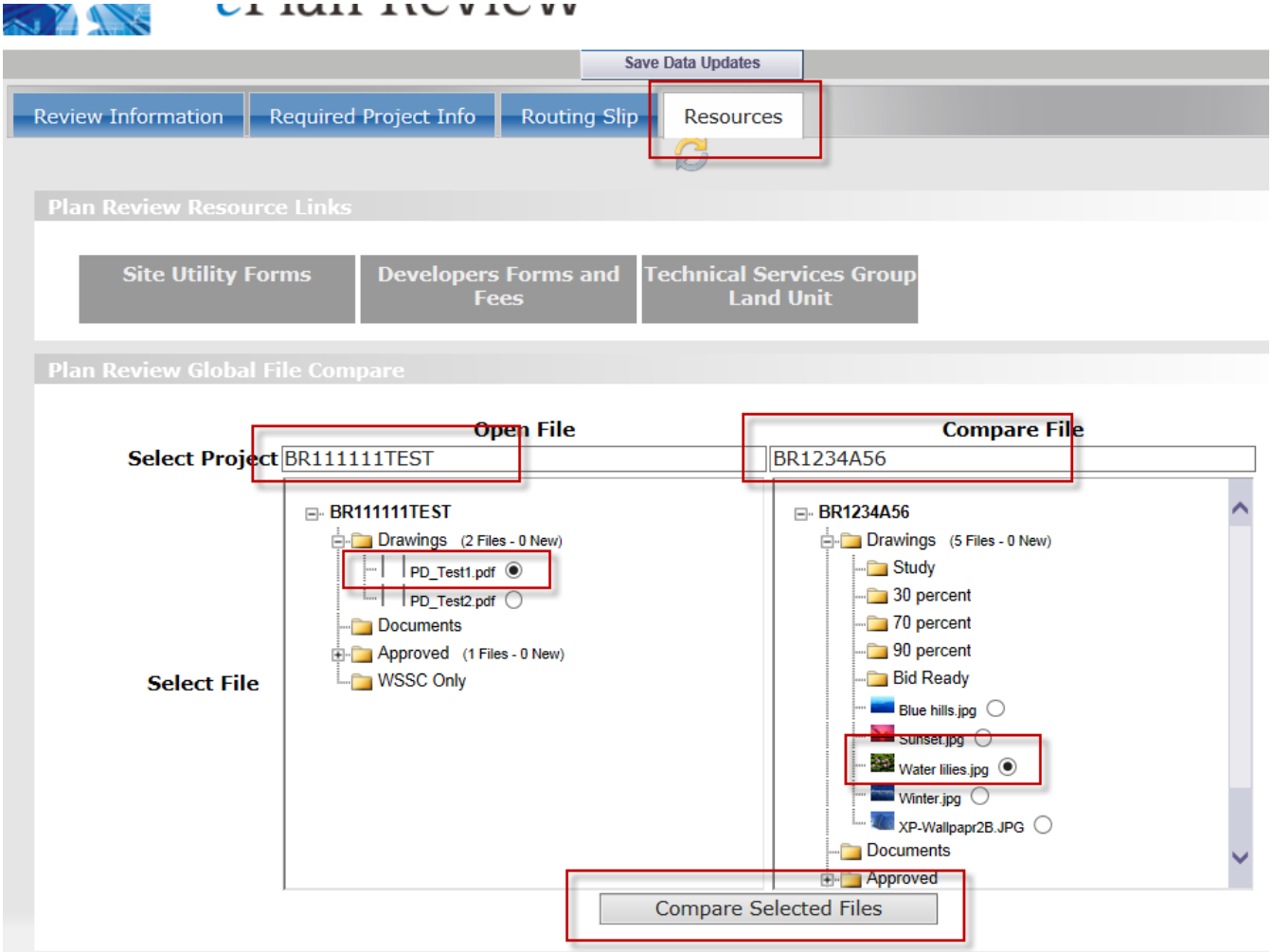
Nudge Alignment
This button is available when using the Overlay, Overlay Differences, Side by Side, Additions, Deletions, and Unchanged viewing modes. You can use the Nudge Alignment commands to nudge and re-scale a compare image or drawing to an open drawing, allowing you to interactively make small adjustments to align the files more precisely. This feature is especially useful for comparing two TIFF images that contain the same text but have different line spacing. Click the Nudge Alignment button and select a direction to nudge the compare file by one increment.

You can also use the hot keys below to quickly nudge the alignment. Use one of the following key combinations (once or multiple times) to nudge the overlaid "older version" in the desired direction:
<Ctrl> + <Left arrow> = nudge position left
<Ctrl> + <Right arrow> = nudge position right
<Ctrl> + <Up arrow> = nudge position up
<Ctrl> + <Down arrow> = nudge position down

Compare files between projects or outside same folder

This is done through the Resources tab on the eForm. There is a section that allows you to pick any 2 files from any 2 projects that you have access to as a user and then hit the compare button. This has to be utilized **when you have a task** and therefore have access to the eForm.

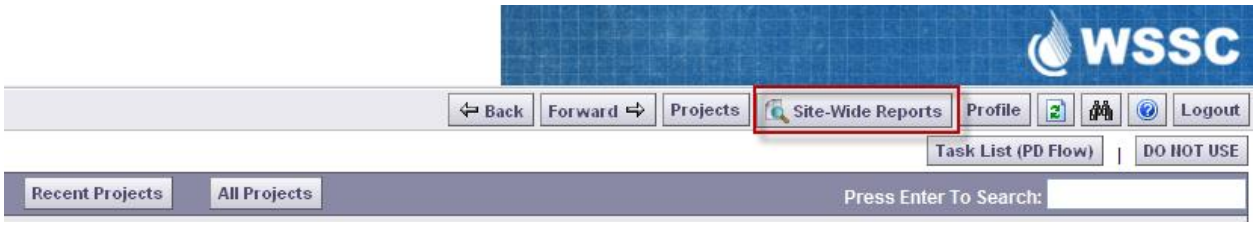
Type in the name of the Project as no pick list is available.



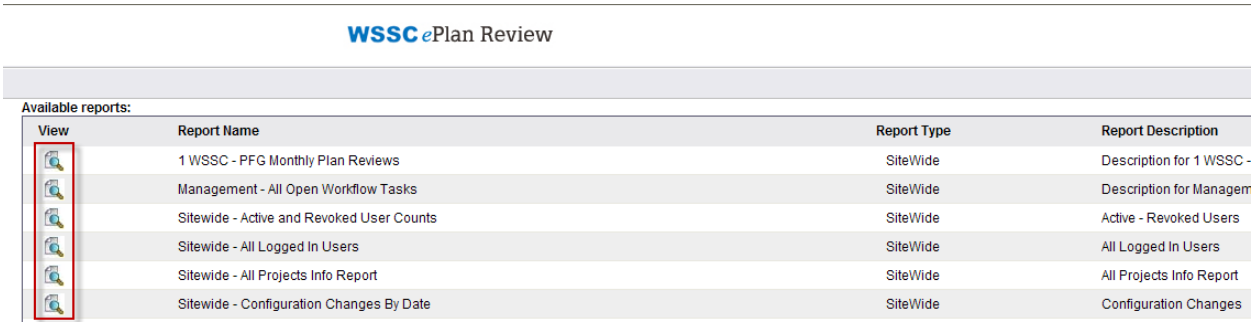
Reports

A Reports tab is available when you enter any project, along with the Project Info tab, that allows System and Project Administrators and Project members to run project-specific reports that have been defined in the Admin/Reports screen and made active by the Database Administrator. Standard reports are delivered with the installation of ProjectDox. Your database administrator can create additional reports upon request. Customization of current reports is also available.

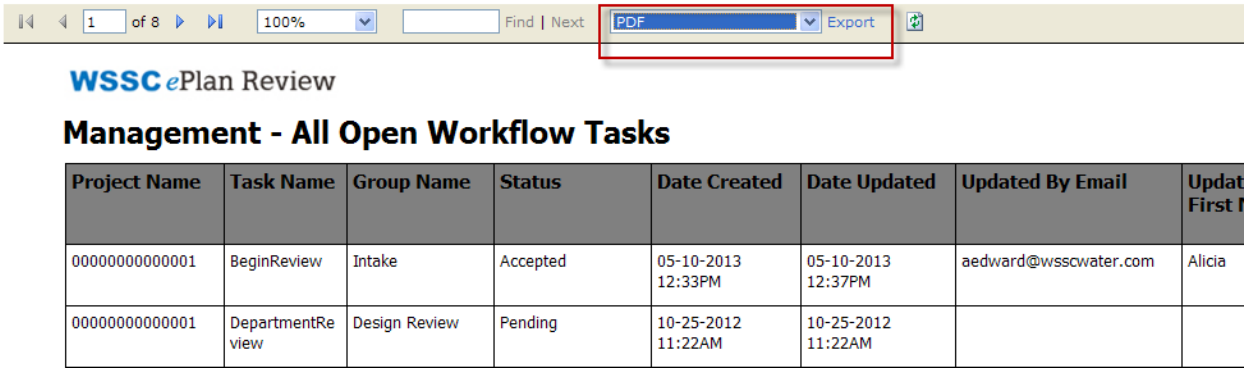
System and Project Administrators may run project reports. Reports that have been created with a type of "Sitewide" can be viewed and executed through the Reports button of the ProjectDox User Interface.



From the Available Reports list (see below), click the report icon to view the information in Report Viewer.



The results will display in the report viewer, which provides options for search navigation, scale, exporting, and printing the currently displayed report.



10. QA Review (QA Review)

After all assigned departments from the Department Review step have completed their task the workflow will send a task notification email to the Review Coordinator and add a task to their task list. This step allows the designated person to:

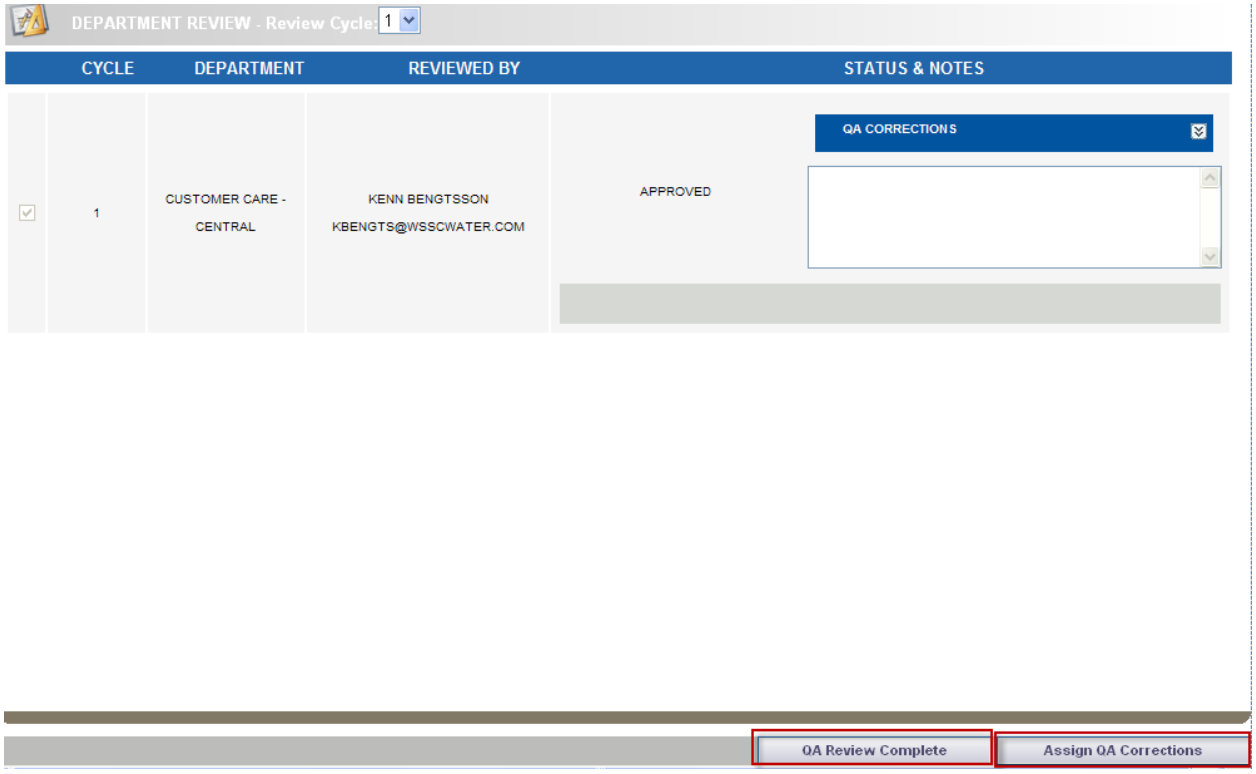
- Perform a quality check on the review
- Return the eForm back to an individual reviewer to make corrections to their review (updated status, comments, add/remove markups) prior to sending the review to the applicant or through final processing

Corrections Required - Assign the review back to a user

1. Select the **Assign Corrections** check box for the required user/department.
2. Add Comments to be viewed by the plan reviewer in the **QA Request** box (as needed).
3. Select the Assign Corrections button.
   a) This will initiate an email to the select plan reviewer and add a task to their task list.
   b) The Plan Reviewer views any comments by QA and can respond via the **QA Response** text box.
   c) The Plan Reviewer makes corrections (follow steps above to complete a review) and completes the review.
   d) Once the review is complete, it returns to the QA Review step.
4. This cycle can be repeated as many times as required.

No Corrections Required

1. If no corrections are needed, select the "**No Correction Required**" button.
   a) The eForm will close and the task removed from the user's task list.


DEPARTMENT REVIEW - Review Cycle: 1
CYCLE
DEPARTMENT
REVIEWED BY
STATUS & NOTES
QA CORRECTIONS
1
CUSTOMER CARE - CENTRAL
KENN BENGTSSON
KBENGTS@WSSCWATER.COM
APPROVED
QA Review Complete
Assign QA Corrections

Review Complete

Participants: Review Coordinator

The Review Complete step will display to the Review Coordinator a completion button based on the results of the review. If any review has the status of "Corrections required**"** the button displayed will be a reject button, and will initiate the "**Resubmit Notification**" to the Applicant. Any other status selected (Approved, No Review Required, Assign Only) will display only the "**Approve"** button, and send the workflow to the final processing steps for electronic plan review.

The Review Coordinator will receive an email notification for assignment to the Review Complete Step after the QAReview step is completed.

1. Select the "**ReviewComplete**" link from the Task List shown under the column heading of **Task**.
    a) This can be done from the global or project specific task lists.
2. A dialog box will display "*Do you want to accept this task*? ". Select "**OK**" to accept responsibility for completing the task.
    a) Accepting the task removes the assignment from other group members task lists.
    b) Status column on the Task List updated from *Pending* to *Accepted*
3. Select the **Approve** or **Reject** button to advance workflow to next step.
    a) This will close the form, complete the task and remove the task from the user's task list.

REVIEW COMPLETE STEP = REJECT

If "**Reject**" was selected the Applicant receives an email notification of the resubmit task assigned to them and a task added to their task list. The applicant has (x) days to resubmit. If the (x) days is exceeded the workflow sends an email notification to the Applicant, Management and Review Coordinator Groups, changes the status of the project to Abandoned (or any status of the jurisdictions choosing) and terminates the workflow. When workflows are terminated by the system information is recorded in the database to allow administrators to create a report to see all workflows in this state.

ApplicantResubmit

To complete the resubmit the applicant should perform the following steps:

Participant: Applicant

1. Log in to ProjectDox.
2. Select the "*ApplicantResubmit*" link from the Task List shown under the column heading of **Task**.

a) This can be done from the global or project specific task lists.

3. A dialog box will display "*Do you want to accept this task?* ". Select "**OK**" to accept responsibility for completing the task.
   a) Status column on the Task List updated from *Pending* to *Accepted.*
4. Applicant should review:
   a) Comments provide by the plan reviewers
   b) View Checklist Items on the Checklist tab
   c) Markups provided in the Markup Section
5. Make required corrections and upload the documents to ProjectDox using the same naming convention as the original file.
6. In the Task Instructions section, select the 3 check boxes to indicate the items have been completed. The selection of all three (3) check boxes will enable the complete button allowing the Applicant to complete the task.
7. Select the "**Review Complete**" button.
   - Respond "**OK"** to the dialog message to complete the task, close the eForm.
   - Click "**Cancel**" to remain on the current view.

The selection of the "**Complete**" and "**OK**" buttons will finish the task for the Applicant, close the eForm and remove the task from their task list. In addition, an email notification has been sent to the Review Coordinator assigning them to the step "*Resubmit Received*".

ResubmitReceived

Participant: Review Coordinator

Once the applicant selects the Review Complete button, a notification is sent to the Review Coordinator Group assigning the task to complete the ResubmitReceived Step. This step allows the Review Coordinator to confirm that plans have been uploaded and confirm the proper departments are selected for assignment for the next review cycle.

To complete this task:

1. Log in to ProjectDox.
2. Select the **"ResubmitReceived"** link from the Task List shown under the column heading of **Task**.
   - This can be done from the global or project specific task lists.
3. A dialog box will display "*Do you want to accept this task?* ". Select **"OK"** to accept responsibility for completing the task.
   - Status column on the Task List updated from *Pending* to *Accepted*.

4. Verify the departments for the next review on the eForm are correct
    a) The system will automatically select the department and the plan reviewer from the previous review cycle (review cycle should have incremented by one).
    b) **EXCEPTION**: Supervisors Groups (Example: Structural Review Supervisor) will not be reassigned only the selected plan reviewer will be selected. If the supervisor wants to be invited instead of the previously selected reviewer for a subsequent cycle the below steps should be done:
        i. Locate the review department from the list and deselect the check box (Example: Structural Review)
        ii. Locate the Supervisor group and select the check box
5. Select the **Begin Re-Review** to complete the task.
    a) Users from the selected departments that have the check box selected are assigned a task and sent an email notification.
    b) The form will close and the task will be removed from the Review Coordinators task list.

REVIEW COMPLETE STEP = APPROVED

11. Batch Stamps (PRC)

Participants: Review Coordinator

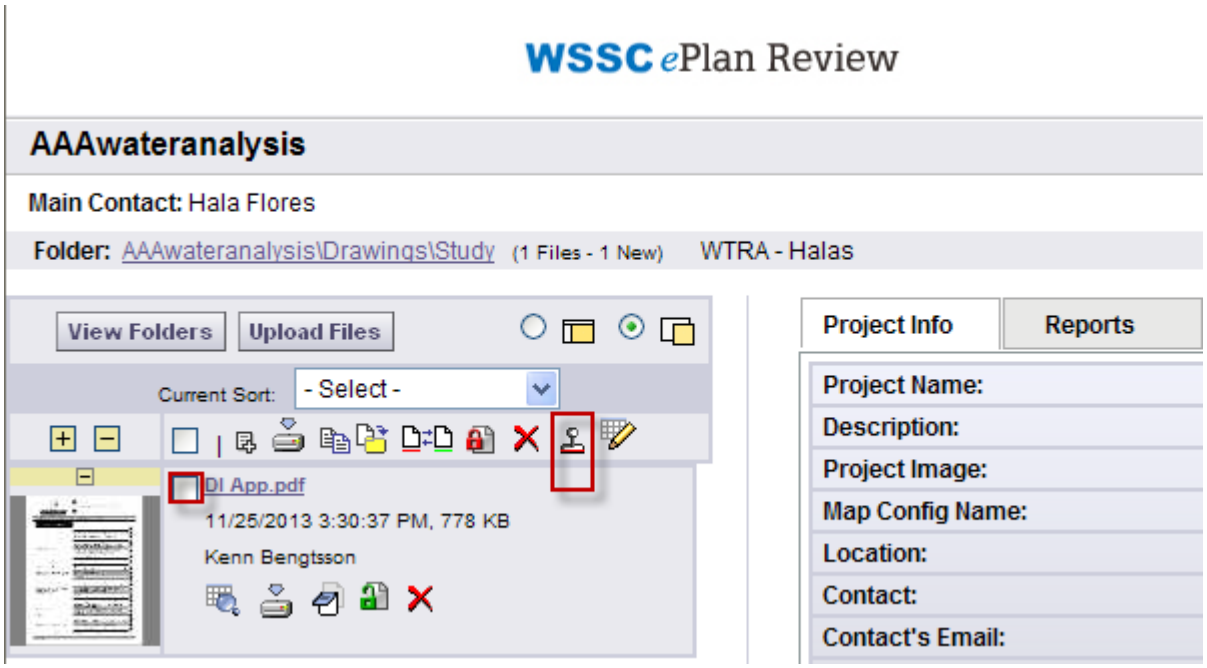
This step is used by the Review Coordinator to apply a final stamp of approval to the plans and documents through a process called Batch Stamping. The Batch Stamp process allows templates to be used for placing the required stamps at designated locations on each file with ease and consistency. The process then places a copy of the stamped plans in the Final Approvals Folder for the Applicant to download.

To complete the task the following steps should be done:

1. Select the task from the task list and select "**OK"** to accept responsibility to complete the task for the group (task removed from other members' task lists). The eForm window will pop up but just minimize it for now.
2. Navigate to the Drawings Folder to perform a Batch Stamp.

Batch Stamp Process

3. Select the applicable file(s) followed by the batch stamp icon
   a) At least one file must be selected in order to use the batch stamp process.



The length of time for the file to complete their processing and display the thumbnail can vary depending on several factors including but not limited to number of files being processed in the batch stamp, uploading/stamping of other projects at the same time, etc.

4. Navigate back to the eForm and in the Task Instructions section select the check box to indicate the plans have been stamped. This action results in the **"Complete"** button becoming enabled.
5. Select the **"Complete"** button to complete the task.
    a) The form will close and the task removed from the Review Coordinator user's task list.